

For three specialty journal sectors, the first half of 2003 brought some impressive double-digit gains in ad spending. But for the rest, there was little respite from the weak market. **Eugene M. May** reports.

TALE OF TWO TRENDS

During the first half 2003, three of the eight specialty journal markets audited by PERQ/HCI for its *Journal Ad Review* (JAR) reported double-digit increases in ad spending, with a fourth posting a marginal gain. The strongest increases were reported by nursing (15.7 percent), radiology (11.7 percent) and pharmacy (11.1 percent). These three specialties had also realized gains during the first half 2002. Hospital management, also in the plus column, had an increase that was somewhat less (4.0 percent) but this was a marked turnaround from the year-ago loss of 8.2 percent.

Of the four markets that declined, optometry posted the biggest loss of 5.6 percent, followed by laboratory, down 4.4 percent, and dental, which was lower by 2.6 percent. Ophthalmology posted a marginal decline of 0.8 percent, following last year's 8.3 percent drop.

A total of 243 journals were audited. The following is a brief review of each specialty market.

Dental down

Having grown by 5.1 percent during the first half of 2002, spending in dental journals registered a 2.6 percent loss during the first six months of 2003. This market demonstrated a high degree of stability with five of last year's top seven repeating in 2003. Ultradent retained the number-one spot even though spending was cut by 21 percent. Discus Dental advanced one position to 2nd, while Ivoclar Vivadent slipped from 2nd to 3rd. Both of these major advertisers reduced ad outlays by approximately 30 percent. GC America climbed from 12th to 4th following a 34 percent boost in ad expenditures. 3M-ESPE remained 5th, with Trident Dental Lab moving up seven spots to 6th.

Denmat slipped from 6th to 7th after a 14 percent reduction in ad spending, while SS White Burs leapt from 50th to 8th as ad outlays shot up 280 percent. Glidewell Laboratories edged up two spots to 9th and Brasseler USA moved from 18th to 10th with spending up 67 percent.

At the product level, there were two new entries in the top 10: Smart-

prep Instruments from SS White Burs (1st) and Biscover Liquid Polish (5th). Products repeating from last year's list include Arestin Minocycline HCl 1 mg Microspheres, up from 8th to 4th, Cercon Smart Ceramics, down four spots to 6th, Citanest Anesthetic Inj., up from 9th to 7th, and the Oral-B 3D Excel Toothbrush, down from 3rd to 8th.

Previously advertised products with big gains include Brasseler Instruments, up from 72nd to 2nd following a 306 percent increase in spending; Ultradent's Tissue Management, up from 24th to 3rd; the Valplast Non Metal Partial Denture, which climbed from 84th to 9th as ad expenditures increased by 109 percent; and the Imtec MDI Sendax Implant System jumped from 247 to 10th on a 360 percent increase.

Hospital management turns around

Ad expenditures in hospital management journals increased by 4.0 percent during the first six months of 2003, a significant improvement following a loss of 8.2 percent in the year-ago period and a drop of 29.3 percent during the first half 2001.

Only four of this year's top 10 were also in this select list at mid-year 2002. Those carrying over include Siemens Medical Systems, up from 2nd to 1st, Cerner Corporation, down one spot to 2nd, and GE Medical Systems which advanced from 5th to 3rd following an 81 percent boost

KEY TRENDS

- Ad revenues for Nursing, Pharmacy and Radiology registered double-digit gains.
- Nursing reported the strongest increase at 15.7 percent.
- Hospital Management reversed a year-ago loss with a moderate 4 percent gain.
- Of the four markets with decreases, none recorded a decline of over 6 percent.

DENTAL JOURNALS

LEADING DENTAL ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		2003	% share of market		% change	
		2002	2001		2002	2001	2003/02	2002/01
1	Ultradent Products	1	2	3.13	3.86	3.08	-21.12	33.94
2	Discus Dental	3	3	2.23	3.06	2.95	-28.85	10.85
3	Ivoclar Vivadent	2	7	2.16	3.08	1.83	-31.49	79.46
4	GC America	12	5	2.13	1.55	2.10	33.59	-21.05
5	3Mespe	5	17	1.95	2.15	1.13	-11.35	102.10
6	Trident Dental Lab	13	18	1.88	1.41	1.12	30.24	33.90
7	Den-Mat Corporation	6	12	1.88	2.12	1.46	-13.80	55.06
8	SS White Burs	50	31	1.81	0.46	0.63	280.48	-21.30
9	Glidewell Laboratories	11	11	1.72	1.59	1.50	4.79	13.31
10	Brasseler USA	18	22	1.71	0.99	0.84	67.19	26.03

Source: PERQ/HCI Journal Ad Review

MOST ADVERTISED DENTAL PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Smartprep Instruments	SS White Burs	-	-	1.27	-	-	-	-
2	Brasseler Instrument	Brasseler USA	72	434	1.22	0.29	0.06	305.85	412.45
3	Ultradent Tissue Management	Ultradent Products	24	158	1.14	0.46	0.18	141.79	170.23
4	Arestin Minocycline HCI IMG Microspheres	Orapharma	8	27	1.00	0.58	0.47	67.13	33.86
5	Biscover Liquid Polish	Bisco Dental Products	-	-	0.75	-	-	-	-
6	Cercon Smart Ceramics	Dentsply Ceramco	2	-	0.72	1.16	-	-39.90	-
7	Citanest Plain and Forte Anesthetic INJ	Dentsply Pharmaceuticals	9	-	0.71	0.58	-	18.89	-
8	Oral-B 3D Excel Toothbrush	Oral-B Laboratories	3	21	0.6	0.74	0.50	-20.89	57.55
9	Valplast non Metal Partial Denture	Trident Dental Lab	84	15	0.58	0.27	0.54	109.25	-46.59
10	Imtec MDI Sendax Implant System	Imtec Corporation	247	467	0.58	0.12	0.06	360.20	131.83

Source: PERQ/HCI Journal Ad Review

in ad outlays. McKesson Information Solutions slipped from 7th to 8th.

Companies that did not advertise in this segment previously include Cardinal Health (4th), Hewlett-Packard (5th) and GlaxoSmithKline (10th). Companies that spent at a rate sufficient to move them into the top 10 include Lawson Software, up from 34th to 6th, Microsoft, up from 13th to 7th and Ingenix, which climbed from 19th to 9th.

Change was even more pronounced at the product/service level with only two of 2002's top 10 repeating. The Soarian Information Solution dropped from 1st to 3rd, Horizon Clinicals from McKesson Information Solutions was unchanged in 5th and Sodexo Services fell from 3rd to 11th. Five new products/services made this year's top 10 list including Cerner Software (1st), Cardinal Health Company Ad (4th), and Avandamet (7th). Also new were Compaq & Hewlett-Packard Computer products (8th) and .Net Connected Software from Microsoft (10th).

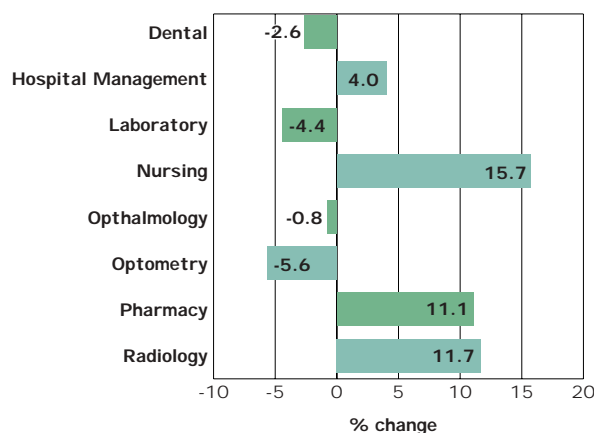
Previously promoted entries that advanced include GE Healthcare Financial Services, up from 58th to 2nd following a 552 percent boost in ad spending, and Ingenix Software & Services, up from 14th to 6th.

Laboratory results negative

During the first half 2003, spending in laboratory journals dropped a 4.4%; disappointing, after last year's marginal gain of 1.9 percent.

Roche Diagnostic Systems, up from 2nd to 1st, was by far the heaviest advertiser as evidenced by a 7.5 percent share of spending. A 42 percent cut in ad outlays dropped Bayer Diagnostics from 1st to 2nd, while Genentech Bio Oncology climbed from 9th to 3rd following a 31%

JOURNAL AD SPENDING BY SECTOR, JAN-JUN 2003 VS. JAN-JUN 2002



Source: PERQ/HCI Journal Ad Review

increase in ad expenditures. Olympus America advanced two spots to 4th and Beckman Coulter slipped two positions to 5th.

Bio-Rad, up from 14th to 6th, was one of three new entries in the top 12. The others were Digene Diagnostics, up from 20th to 8th following a 78 percent boost in spending, and Lifescan, up from 16th to 10th.

HOSPITAL MANAGEMENT JOURNALS

LEADING HOSPITAL MANAGEMENT ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Siemens Medical Systems	2	4	3.64	3.44	2.64	10.06	19.72
2	Cerner Corp	1	5	2.93	4.78	2.32	-36.30	88.96
3	GE Medical Systems	5	10	2.78	1.60	1.33	80.96	10.34
4	Cardinal Health	-	-	2.56	-	-	-	-
5	Hewlett-Packard	-	-	2.31	-	-	-	-
6	Lawson Software	34	-	2.01	0.61	-	243.03	-
7	Microsoft Corporation	13	9	1.90	1.21	1.43	63.66	-22.35
8	McKesson Information Solutions	7	-	1.87	1.46	-	33.25	-
9	Ingenix	19	3	1.86	0.95	2.72	104.28	-67.97
10	GlaxoSmithKline	-	-	1.85	-	-	-	-

Source: PERQ/HCI Journal Ad Review

MOST ADVERTISED HOSPITAL MANAGEMENT PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	CernerSoft/Cerner Software	Cerner Corp	-	161	2.93	-	0.16	-	-100
2	GE Healthcare Financial Services	GE Medical Systems	58	65	2.49	0.40	0.32	552.06	14.49
3	Soarian Information Solution	Siemens Medical Systems	1	-	2.02	2.86	-	-26.56	-
4	Cardinal Health Company Ad	Cardinal Health	-	-	1.88	-	-	-	-
5	Horizon Clinicals	McKesson Information Solutions	5	-	1.87	1.46	-	33.25	-
6	Ingenix Software & Services	Ingenix	14	1	1.86	0.95	2.55	104.28	-65.87
7	Avandamet Tablets	GlaxoSmithKline	-	-	1.85	-	-	-	-
8	Computers/Tablet PCs/Pocket PCS	Hewlett-Packard	-	-	1.8	-	-	-	-
9	LawsonSoft	Lawson Software	81	-	1.69	0.31	-	465.10	-
10	.Net Connected Spftware	Microsoft Corporation	-	-	1.68	-	-	-	-

Source: PERQ/HCI Journal Ad Review

Inova Diagnostics was unchanged at 7th, while BD Vacutainer Systems dropped one position to 9th.

This market usually relies on new products/services to maintain ad revenues and this year was no different as five making the top 10. Other than Hecceptin, which retained the number-one spot, the next four were all new entries. Roche Diagnostic Systems' Integrated Modular Analytics, and Elecsys ProBNP Assay were 2nd and 3rd, respectively, followed by the Quanta Lite CCP Elisa Kit (4th) and a Cardinal Health Company Ad (5th). The other new product/service was Quest Diagnostics' Nichols Services (10th). The Gem Premier 3000 Whole Blood Analyzer dropped four spots to 9th. Previously advertised products/services moving into the top 10 include the BX45/BX2 Microscope Series, up from 32nd to 7th on a 62 percent increase in ad outlays, and Lifescan's Datalink Integrated Information Management Systems, up from 92nd to 8th following a 195 percent boost in spending.

Nursing records strongest growth

Of all specialty markets reviewed, nursing journals had the highest growth rate (15.7 percent) during the first half 2003. This gain follows a 9.2 percent increase during the first six months of 2002.

As in previous years, advertisers involved primarily with recruitment dominate the list. Nurses Service Organization, a liability insurance provider is an exception, and continues as the top advertiser with a 4.2 percent share of spending. The other exception is Becton Dickinson, which climbed from 24th to 6th following a 171 percent boost in ad

spending. The top recruitment advertiser in nursing journals is Texas (2nd) followed by Supplement Health Care Services (3rd), American Traveler (4th) and Cross Country Travcorps (5th).

Others that appeared in both the 2002 and 2003 lists include American Mobile Healthcare (7th), Vita Medical Staffing (8th), North Carolina (9th) and Medical Express (10th). Liability Insurance for Nurses continued as the most heavily advertised product service as ad outlays increased by 13 percent. American Traveler moved up one spot to 2nd following a 24 percent increase in spending, while Supplemental Health Care Staff Recruitment slipped from 2nd to 3rd. The next four, Cross Country Travcorps Recruitment (4th), American Mobile Nurses Recruitment (5th), Vita Medical Staff Recruitment (6th) and Medical Express Recruitment (7th) were unchanged from a year ago. Contract Management Services by Texas dropped from 8th to 10th. Moving into the top 12 were Travel Nursing.com, up from 14th to 8th after increasing ad spending by 59 percent and Medical Staffing Network Recruitment, up from 22nd to 9th following a 134% boost in ad outlays.

Ophthalmology remains weak

After registering a loss of 8.3 percent during the first half 2002, spending in ophthalmology publications was down another 0.8 percent at mid-year 2003. Significantly lower ad expenditures by Merck, Bausch & Lomb and Novartis Ophthalmics were major factors in the decline.

Six companies made both the 2002 and 2003 top 10 lists, including Alcon Laboratories, which repeated in the number-one spot with an

LABORATORY JOURNALS

LEADING LABORATORY ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Roche Diagnostic Systems	2	1	7.46	4.71	5.7	51.57	-15.72
2	Bayer Diagnostic Division	1	9	3.14	5.19	2.00	-42.17	164.37
3	Genentech Bio Oncology	9	25	2.80	2.05	0.92	30.61	127.06
4	Olympus America	6	5	2.78	2.64	2.16	0.79	24.86
5	Beckam Coulter	3	6	2.62	4.18	2.12	-40.08	101.00
6	Bio-Rad	14	7	2.52	1.42	2.06	69.68	-29.66
7	Inoca Diagnostics	7	4	2.04	2.34	2.33	-16.28	2.07
8	Digene Diagnostics	20	234	1.82	0.98	0.06	78.43	1700.19
9	BD Vacutainer Systems	8	233	1.74	2.11	0.06	-21.32	3795.67
10	Lifescan	16	8	1.70	1.30	2.05	25.17	-35.23

Source: PERO/HCI Journal Ad Review

MOST ADVERTISED LABORATORY PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Herceptin	Genentech Bio Oncology	1	15	2.8	2.05	0.92	30.61	127.06
2	Integrated Modular Analytics from Roche	Roche Diagnostic Systems	-	-	2.53	-	-	-	-
3	Elecsys Probnp Assay/Fully Auto Chf Assay	Roche Diagnostic Systems	-	-	2.47	-	-	-	-
4	Quanta Lite Ccp Elisa Kit	Inova Diagnostics	-	-	1.40	-	-	-	-
5	Cardinal Health Company Ad	Cardinal Health	-	-	1.21	-	-	-	-
6	Hybrid Capture II HPV DNA Test	Digene Diagnostics	11	370	1.13	0.98	0.06	10.44	1700.19
7	BX45/BX2 Microscope Series	Olympus America	32	13	1.01	0.60	0.96	61.93	-36.49
8	Datalink Integrated Info. Management Sys.	Lifescan	92	2	0.99	0.32	1.48	195.23	-77.92
9	GEM Premier 3000 Whole Blood Analyzer	Instrumentation Lab	5	20	0.99	1.17	0.72	-18.90	63.93
10	Quest Diagnostics Nichols Institute Services	Quest Diagnostics	-	-	0.98	-	-	-	-

Source: PERO/HCI Journal Ad Review

18.2 percent share of all ad expenditures in this segment. Pharmacia Ophthalmology advanced from 3rd to 2nd, Allergan slipped from 2nd to 3rd and Advanced Medical Optics was unchanged in 4th place. Others carrying over from the prior year list include Santen, up from 8th to 6th and J&J McNeil partnership (10th) which promotes Ocuflax. New entries include Allergan, up from 66th to 5th, Care Zeiss Meditec AG, which climbed from 33rd to 7th following a 199 percent increase in ad outlays, and Alcon Ophthalmic Inc. up from 16th to 9th.

At the product level, Xalatan, Travatan and Lumigan retained their respective top three positions. Allergan's Alphagan P Ophthalmic Solution advanced two spots to 7th, while Alcon's Ladarvision 4000 Ladartracker repeated in 8th place.

Newly advertised products include the Tecnis Foldable IOL (4th), Allergan's Restasis (5th) and Alcon's Systane Lubricant Drops (9th). The one previously advertised product, Santen's Quixin, climbed from 23rd to 6th following a 138 percent boost in spending.

Optometry registers moderate loss

Optometry was the weakest specialty market as ad outlays declined by 5.6 percent during the first half 2003. In the prior year-ago period, this segment had a gain of 2.7 percent.

There was considerable turnover at the company level as only six advertisers in the first half 2002 list repeated during the first six months of 2003. Alcon Laboratories climbed to 1st (from 7th) following an 82 percent increase in ad expenditures, while Marchon Eyewear (2nd) and

Viva International (3rd) were each up one position. A 33 percent cut in spending dropped CIBA Vision from 2nd to 5th, while the Luxottica Group slipped from 5th to 6th.

Previous advertisers moving up include Transitions Optical (9th to 7th) and the Essilor Group (12th to 8th). Signet Armorlite, shot up from 62nd to 4th as ad outlays jumped 404 percent, while Hart Specialties (9th) and Vision Expo (10th) were each up four places, despite minor cuts in spending.

There were seven products that were new to the top 10. Transition Lightweight Plastic Lenses (1st) and the Kodak Precise Progressive Lens (2nd) were new products. Previously advertised products include Travatan Ophthalmic Solution, up from 24th to 4th, Optical Tints, Chemicals and Instruments from Brainpower, up from 124th to 6th as ad expenditures climbed 341 percent, Patanol Ophthalmic Solution, which advanced 11 spots to 7th, and the Axcell CL Automates Lens Finishing System, up from 23rd to 10th.

Vision Expo was unchanged in 3rd, Cocoons Eyewear fell to 5th, Focus Night & Day Lenses from CIBA Vision, was up from 12th to 8th, and Alcon's No Rub Opti-Free Disinfectant Solution, fell to 9th.

Pharmacy posts double-digit gain

Driven largely by new product introductions, advertising in pharmacy journals registered an 11.1 percent gain during the first half 2003. This solid performance follows a 5.9 percent increase in the prior year-ago period.

Five companies in the top 10 were also represented in the first half

NURSING JOURNALS

LEADING NURSING ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Nurses Service Organization	1	2	4.23	4.31	4.54	13.45	3.62
2	Texas	4	1	3.66	3.38	4.78	25.31	-22.91
3	Supplement Health Care Services	2	3	3.45	3.53	3.09	13.12	24.82
4	American Traveler	3	12	3.39	3.39	1.73	15.78	114.66
5	Cross Country Travcorps	5	4	2.87	3.01	2.76	10.58	19.09
6	Becton Dickinson	24	135	2.40	1.02	0.14	171.05	672.06
7	American Mobile Healthcare	7	8	2.21	2.25	2.13	13.59	15.27
8	Vita Medical Staffing	9	-	1.89	2.07	-	5.16	-
9	North Carolina	8	7	1.87	2.15	2.25	0.58	4.72
10	Medical Express	11	10	1.85	1.94	2.02	10.50	4.71

Source: PERQ/HCI Journal Ad Review

MOST ADVERTISED NURSING PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Nursinsur/Liability Insurance	Nurses Service Organization	1	1	4.23	4.31	4.54	13.45	3.62
2	American Traveler FL Rec	American Traveler	3	11	3.39	3.17	1.73	23.99	100.46
3	Supplemental Health Care Recruitment	Supplement Health Care Services	2	2	3.14	3.53	3.09	3.15	24.82
4	Cross Country Travcorps Recruitment	Cross Country Travcorps	4	3	2.75	2.78	2.76	14.34	10.26
5	American Mobile Nurses Recruitment	American Mobile Healthcare	5	6	2.21	2.25	2.13	13.59	15.27
6	Vita Medical Staffing Recruitment	Vita Medical Staffing	6	-	1.89	2.07	-	5.16	-
7	Medical Express Recruitment	Medical Express	7	9	1.85	1.94	2.02	10.50	4.71
8	Travel Nursing.com	Travel Nurse.com	14	-	1.79	1.30	-	58.96	-
9	Msnrecruit	Medical Staffing Network	22	14	1.77	0.88	1.31	133.60	-27.18
10	Contract Manamement Services by Tx	Contract Management Services	8	13	1.53	1.89	1.49	-6.36	38.80

Source: PERQ/HCI Journal Ad Review

2002. Pfizer repeated at number one, followed by GlaxoSmithKline, which advanced from 7th to 2nd as spending was boosted by 137 percent, and a relatively new marketing partnership, Bristol-Myers Squibb and Otsuka ranked 3rd. Roche climbed eight spots to 4th, Ortho McNeil advanced from 15th to 5th as ad expenditures increased by 137 percent, and Teva Pharmaceuticals slipped one spot to 6th even though ad spending grew by 23 percent.

AstraZeneca slipped from 3rd to 7th, Cardinal Health leapt from 326th to 8th, and Mylan Pharmaceuticals climbed from 11th to 9th. Novo Nordisk shot up from 34th to 10th.

All but two of the top products/services were newly advertised entries. Abilify, the co-promoted antipsychotic from Bristol-Myers Squibb and Otsuka was 1st, Ortho Tri-cylen Lo took 2nd place and Pfizer's Vfend ranked 3rd. Roche's Pegasys was 4th followed by Avandamet from GlaxoSmithKline (5th) and a Cardinal Health Company Ad (6th). Seroquel fell from 5th to 7th, Pfizer's Neurontin was 8th, Teva's mintazapine, a generic version of the tetracyclic anti-depressant, Remeron, was 9th, and Procrit was down four spots to 10th.

Radiology reports strong growth

New advertisers and new products/services helped drive growth in this segment with first-half 2003 journal ad spending advancing 11.7 percent over the year-ago period. This gain comes on top of a 2.4 percent increase during the first six months of 2002.

Siemen's Medical Systems, one of six advertisers that also made the 2002 list, repeated in the number one spot with a 5.0 percent share of ad spending. Amersham Health (2nd) and Philips Medical System (3rd) traded places when compared to the prior year-ago period, while GE Medical Systems advanced one place to 4th. Hitachi Medical Corporation advanced one spot to 6th.

Previous advertisers moving into the top 10 list include Eastman Kodak, up from 50th to 7th, Bracco Diagnostics which leapt from 180th to 8th and Toshiba, up from 19th to 10th as ad expenditures increased 102 percent. The last of this year's new advertisers were CPS Innovations (5th) and Cardinal Health (9th).

The five new products/services that made the first half 2003 list include the LSO Crystal Detector from CPS Innovations (1st), the Philips Medical System (2nd) and the Sony Filmstation Day Film Imager (4th). Other new entries were Magnevist from Berlex Imaging (6th) and a Cardinal Health Company Ad (8th).

Those repeating in the list were the Synapse Connectivity System, down two spots to 7th, the HDI 5000 Sonoct System from Philips Ultrasound, down from 1st to 9th following a 22 percent cut in ad outlays, and the Omniscan Injection, down four places to 10th even though ad expenditures increased by 19 percent.

Moving into the top 12 were an Amersham Health Company Ad, up from 21st to 3rd and Kodak Imaging Solutions, up from 42nd to 5th as ad spending jumped 191 percent.

OPHTHALMOLOGY JOURNALS

LEADING OPHTHALMOLOGY ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Alcon Laboratories	1	1	18.17	14.68	12.35	22.77	9.04
2	Pharmacia Ophthalmology	3	5	11.20	7.07	4.7	57.04	37.96
3	Allergan	2	2	9.24	7.15	9.87	28.15	-33.57
4	Advanced Medical Optics	4	10	5.18	6.24	1.84	-17.65	211.59
5	Allergan Pharmaceuticals and J&J McNeil	66	-	3.39	0.26	-	1184.31	-
6	Santen	8	6	2.51	2.19	2.4	13.87	-16.49
7	Carl Zeiss Meditec AG	33	56	2.06	0.68	0.31	198.86	101.17
8	Visx Incorporated	11	7	1.96	1.59	2.1	22.24	-30.64
9	Alcon Ophthalmic	16	20	1.46	1.13	0.85	28.35	22.36
10	Allergan Pharmaceuticals and J&J McNeil	10	84	1.28	1.61	0.17	-21.34	763.81

Source: PERQ/HCI Journal Ad Review

MOST ADVERTISED OPHTHALMOLOGY PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Xalatan Solution for Glaucoma	Pharmacia Ophthalmology	1	2	5.75	4.80	3.33	18.78	32.24
2	Travatan Ophthalmic Solution	Alcon Laboratories	2	5	3.52	4.31	2.58	-19.11	53.33
3	Lumigan Ophthalmic Solution	Allergan	3	4	3.27	3.11	2.76	4.33	3.12
4	Tecnis Foldable IOL	Pharmacia Ophthalmology	-	-	3.16	-	-	-	-
5	Restasis for Dry Eye	Allergan Pharmaceuticals	-	-	2.27	-	-	-	-
6	Quixin Ophthalmic Fluoroquinolone	Santen Incorporated	23	12	2.12	0.88	1.48	138.38	-45.18
7	Alphagan P Ophthalmic Solution	Vita Medical Staffing	9	-	1.96	1.68	-	15.61	-
8	Ladarvision 4000 Ladartracker	Alcon Laboratories	8	9	1.88	1.69	2.02	10.87	-23.48
9	Systane Lubricant Eye Drops	Alcon Laboratories	-	-	1.83	-	-	-	-
10	Healon5 Viscoadaptive	Pharmacia Ophthalmology	7	29	1.78	1.83	0.79	-3.82	112.99

Source: PERQ/HCI Journal Ad Review

OPTOMETRY JOURNALS

LEADING OPTOMETRY ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Alcon Laboratories	7	7	4.10	2.13	2.06	81.97	6.29
2	Marchon Eyewear	3	1	2.86	2.59	2.59	4.22	2.91
3	Viva International Group	4	13	2.75	2.36	1.58	10.13	53.29
4	Signet Armorlite	62	38	2.65	0.50	0.68	403.52	-25.29
5	Ciba Vision	2	10	2.30	3.26	1.79	-33.43	86.62
6	Luxottica Group	5	6	2.21	2.30	2.10	-9.03	12.38
7	Transitions Optical	9	8	2.05	1.94	2.03	-0.20	-1.91
8	Essilor Group	12	9	1.71	1.59	1.92	2.07	-14.99
9	Hart Specialties	13	19	1.43	1.45	1.30	-7.00	14.85
10	Vision Expo	14	14	1.36	1.36	1.47	-5.04	-5.28

Source: PERQ/HCI Journal Ad Review

MOST ADVERTISED OPHTHALMOLOGY PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Transitions Lightweight Plastic Lenses	Transitions Optical	-	5	1.94	-	1.22	-	-
2	Kodak Precise Progressive Lens	Signet Armorlite	-	-	1.94	-	-	-	-
3	VisionExpo	VisionExpo	3	1	1.33	1.33	1.47	-5.66	-7.31
4	Travatan Ophthalmic Solution	Alcon Laboratories	24	26	1.22	0.64	0.59	80.23	10.61
5	Cocoons Eyewear	Live Eyewear	4	-	1.20	1.20	-	-6.18	-
6	BPI F/Optical Tints, Chemicals, Instruments	Brain Power	124	14	1.07	0.23	0.97	341.2	-75.70
7	Patanol Ophthalmic Solution	Alcon Ophthalmic	18	44	0.97	0.69	0.45	32.53	56.56
8	Focus Night&Day Continuous Wear Lenses	Ciba Vision	12	-	0.93	0.73	-	19.95	-
9	No Rub Opti-free Disinfect Solution	Alcon Laboratories	7	73	0.90	0.92	0.33	-7.14	186.66
10	Axcell CL Lens Finishing System	Briot Universal	23	-	0.88	0.65	-	27.84	-

Source: PERQ/HCI Journal Ad Review

PHARMACY JOURNALS

LEADING PHARMACY ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Pfizer Laboratories	1	1	5.34	4.29	6.63	38.40	-31.52
2	GlaxoSmithKline	7	6	3.81	1.79	1.72	136.62	9.81
3	Bristol-Myers Squibb Co and Otsuka Pharmaceuticals	-	-	3.17	-	-	-	-
4	Roche Laboratories	12	16	2.67	1.34	0.87	121.16	63.58
5	Ortho Pharm & McNeil Pharm	15	32	2.36	1.11	0.61	137.38	93.34
6	Teva Pharmaceuticals USA	5	5	2.36	2.14	1.82	22.54	24.57
7	AstraZeneca	3	2	2.11	2.77	3.21	-15.13	-8.81
8	Cardinal Health	326	-	1.35	0.05	-	3070.73	-
9	Mylan Pharmaceuticals	11	7	1.26	1.44	1.67	-3.00	-8.64
10	Novo Nordisk Pharmaceutical	34	353	1.09	0.56	0.04	116.09	1429.64

Source: PERO/HCI Journal Ad Review

MOST ADVERTISED PHARMACY PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	Abilify (Aripiprazole)	Bristol-Myers Squibb/Otsuka Pharm.	-	-	3.17	-	-	-	-
2	Ortho Tri-Cyclen Lo Tablet	Ortho Pharm. & McNeil Pharm.	-	-	2.18	-	-	-	-
3	Vfend IV/Oral (Voriconazole)	Pfizer Laboratories	-	-	1.66	-	-	-	-
4	Pegasys for Injection & Copegus Tablets	Roche Laboratories	-	-	1.44	-	-	-	-
5	Avandamet Tablets	GlaxoSmithKline	-	-	1.40	-	-	-	-
6	Cardinal Health Company Ad	Cardinal Health	-	-	1.22	-	-	-	-
7	Seroquel Tablets	AstraZeneca	5	18	1.17	1.36	0.75	-4.65	92.99
8	Neurontin Capsules/Tablets/Oral Solution	Pfizer Laboratories	-	-	1.14	-	-	-	-
9	Mirtazapine Tablets from Teva Pharm	Teva Pharmaceuticals USA	-	-	1.08	-	-	-	-
10	Procrit	Ortho Biotech	6	6	1.07	1.28	1.32	-7.77	2.59

Source: PERO/HCI Journal Ad Review

RADIOLOGY JOURNALS

LEADING RADIOLOGY ADVERTISERS BY EXPENDITURE, JAN-JUN 2003

Rank	Company	Previous rank		% share of market			% change	
		2002	2001	2003	2002	2001	2003/02	2002/01
1	Siemens Medical Systems	1	2	4.99	4.72	3.11	18.20	55.37
2	Amersham Health	3	19	3.96	2.11	1.14	109.79	89.77
3	Philips Medical Systems	2	11	3.19	2.47	1.74	43.94	45.68
4	GE Medical Systems	5	4	2.53	2.00	2.81	41.16	-26.95
5	CPSI	-	-	1.94	-	-	-	-
6	Hitachi Medical Corporation	7	13	1.74	1.70	1.40	14.53	24.52
7	Eastman Kodak	50	3	1.72	0.54	2.92	254.39	-81.02
8	Bracco Diagnostics	180	15	1.69	0.13	1.28	1394.30	-89.91
9	Cardinal Health	-	-	1.62	-	-	-	-
10	Toshiba	19	5	1.55	0.86	2.41	101.70	-63.49

Source: PERO/HCI Journal Ad Review

MOST ADVERTISED RADIOLOGY PRODUCTS AND SERVICES, JAN-JUN 2003

Rank	Product	Manufacturer	Previous rank		% share of market			% change	
			2002	2001	2003	2002	2001	2003/02	2002/01
1	LSO Crystal Detector/Family Pet/Ct	CPSI	-	-	1.94	-	-	-	-
2	Philips Medical System	Philips Medical System	-	-	1.76	-	-	-	-
3	Amersham Health Co Ad	Amersham Health	21	-	1.72	0.7	-	175.65	-
4	Filmstation Dry Film Imager	Sony	-	-	1.44	-	-	-	-
5	Kodak Imaging Solutions	Eastman Kodak	42	62	1.30	0.5	0.38	190.90	33.51
6	Magnevist	Berlex Imaging	-	-	1.21	-	-	-	-
7	Synapse Connectivity System	Fuji Medical Systems USA	5	38	1.17	1.01	0.52	29.69	96.81
8	Cardinal Health Company Ad	Cardinal Health	-	-	1.16	-	-	-	-
9	HDI 5000 Sonoct System	Philips Ultrasound International	1	-	1.14	1.62	-	-21.44	-
10	Omniscan Injection	Amersham Health	6	4	1.06	1.00	1.14	19.34	-10.38

Source: PERO/HCI Journal Ad Review