Pfizer \$1.858.85 -12.0% \$801.64 Merck & Co. \$1,489.41 \$1,139.22

\$1.137.77

\$1.063.02

\$833.41

\$810.38

\$802.99

\$787.86

\$755.92

\$572.06

\$502.52

\$486.99

\$479.98

\$398.08

\$369.24

\$360.60

\$353.22

2013

(Millions)*

Rank Company

Forest Laboratories

Boehringer Ingelheim

Bristol-Myers Squibb

Johnson & Johnson

Otsuka Pharmaceutical Group

GlaxoSmithKline

Novo Nordisk Daiichi Sankyo

Sanofi

Takeda

Amgen AbbVie

Allergan

AstraZeneca

Eli Lilly

Novartis

Total Promo Spend

-2.6% \$246.85 23.0% \$0.58 \$247.62 -8.9%

2013

(Millions)

\$415.97

\$65.49

\$46.04

\$144.03

\$134.05

\$97.87

\$109.97

\$0.02

\$29.27

\$184.35

\$286.79

\$185.79

\$112.73

\$2.68

Fig 4: US Spend for Total Promo, DTC, eDetailing, Professional Detailing, Professional Meetings, Journal Ads

% change

vs 2012

-22.6%

-9.1%

-22.8%

-10.4%

-6.1%

16.2%

15.0%

-2.8%

0.3%

-8.0%

-7.5%

56.1%

-0.2%

678.5%

44.1% 19.9% -8.2%

% change

vs 2012

34.2%

-14.2%

-62.7%

-36.9%

-17.7%

-23.6%

43.4%

29.1%

-95.8%

-25.7%

-81.2%

-20.1%

44.4%

3.731.9%

-7.8%

\$13.89 23.3% -6.2% -18.8% \$10.70 \$9.94 -9.3%

% change

vs 2012

8.2%

12.1%

3.7%

2.4%

-31.2%

2.0%

23.4%

79.9%

-29.7%

6.9%

-43.2%

-10.6%

-46.9%

268.8%

4.7%

-35.3%

2013

(Millions)

\$33.26

\$18.99

\$13.77

\$22.42

\$14.33

\$7.28

\$20.90

\$8.06

\$2.71

\$8.96

\$9.74

\$3.36

\$1.01

\$2.14

\$2.89

\$9.18

\$4.14

\$1,113.37 \$1,020.54 \$798.77 \$571.91 \$691.57

-2.2% 21.6% -12.1% -23.5% -14.6% -15.7%

-12.2%

-12.2%

10.8%

16.2%

-11.4%

-2.6%

-12.3%

-5.1%

43.5%

2.5%

8.5%

-13.9%

620.7%

% change

vs. 2012

-12.0%

Total Professional Detailing

2013

(Millions)

\$916.88

\$652.45

\$602.77

\$540.20

\$529.39

\$391.71

\$473.69

\$371.09

\$423.70

\$155.95

\$63.02

\$140.89

\$191.84

\$247.09

\$211.93

\$1.99 \$0.80 \$3.74 \$0.84 \$1.49 \$1.09 \$1.89 \$1.89

\$1.53

\$4.37

\$1.05

\$0.20

\$0.74

\$0.13

\$1.01

\$0.75

\$0.66

\$0.71

\$0.77

\$0.85

2013

(Millions)

Journal Advertising

-69.5% -52.1% -76.9% -21.7% -62.0% -57.1% -20.6% -20.6% -76.8% -39.6%

-66.2%

-53.1%

-68.6%

-91.7%

-29.9%

-28.6%

-26.8%

-35.0%

28.3%

-40.4%

% change

vs. 2012

\$24.59

\$72.50

\$49.98

\$49.28

\$17.27

\$46.61

\$34.18

\$36.73

2013

(Millions)

\$115.07

Total Professional Meetings

% change

vs. 2012

27.3%

-10.5%

13.7%

-18.0%

-12.8%

-27.3%

4.1%

1.7%

2.7%

5.3%

22.4%

-28.2%

26.4%

-0.8%

-17.0%

10.1%

51.3%

-26.2%

-6.2%

Otsuka Pharmaceutical Group

Company

Pfizer

Eli Lilly

Allergan

Sunovion

Teva

14

15

17

19

Merck & Co.

AstraZeneca

Forest Laboratories

^{\$101.92} \$112.02 \$112.02 \$82.15 \$53.34 \$69.65 \$99.35 \$47.63 \$98.81 \$100.56 \$61.90

Boehringer Ingelheim **Novartis** GlaxoSmithKline **Bristol-Myers Squibb** Johnson & Johnson Novo Nordisk Daiichi Sankyo Sanofi Takeda **Amgen AbbVie**

Teva \$300.59 11.9% \$14.85 -60.5% \$281.65 -14.4% \$28.17 Sunovion -42.4% * Total promotional spend figure does not include amount spent on samples, clinical trials or direct mail Source: CSD—Cegedim Strategic Data Note: Due to resampling of Journals in the CSD audit, 2012 and 2013 data may not be comparable for all publications