

Market Research Print Journal Readership

2008

Sources

“Medical Journal Readership Study: Canada” 2008 by Ipsos Marketing

Questionnaires mailed to 3,620 physicians for self-completion with a 17% response rate

“The Essential Journal Study: Canada” 2008 by The Matalia Group

Questionnaires mailed to 6,280 physicians for self-completion with a 18% response rate

“PMB Medical Media Study: 2008” by PMB Print Measurement Bureau

Over a 2 year period, 6,666 questionnaires were mailed yielding 2,949 completed surveys, a response rate of 45.5%

“ePharma Physician v7.0: The Future of Professional eMarketing” 2007 by Manhattan Research

Survey of 1,438 online practicing US physicians

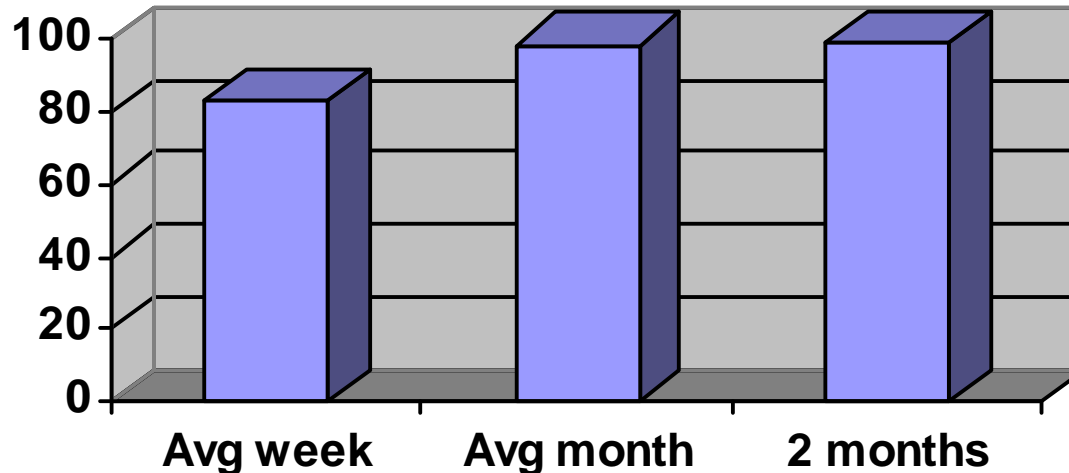
“Insights Into Physician Media Usage” 2007 by The Nielsen Company

Questionnaires mailed to 16,480 respondents for self-completion with a 15% response rate

Frequency of Readership

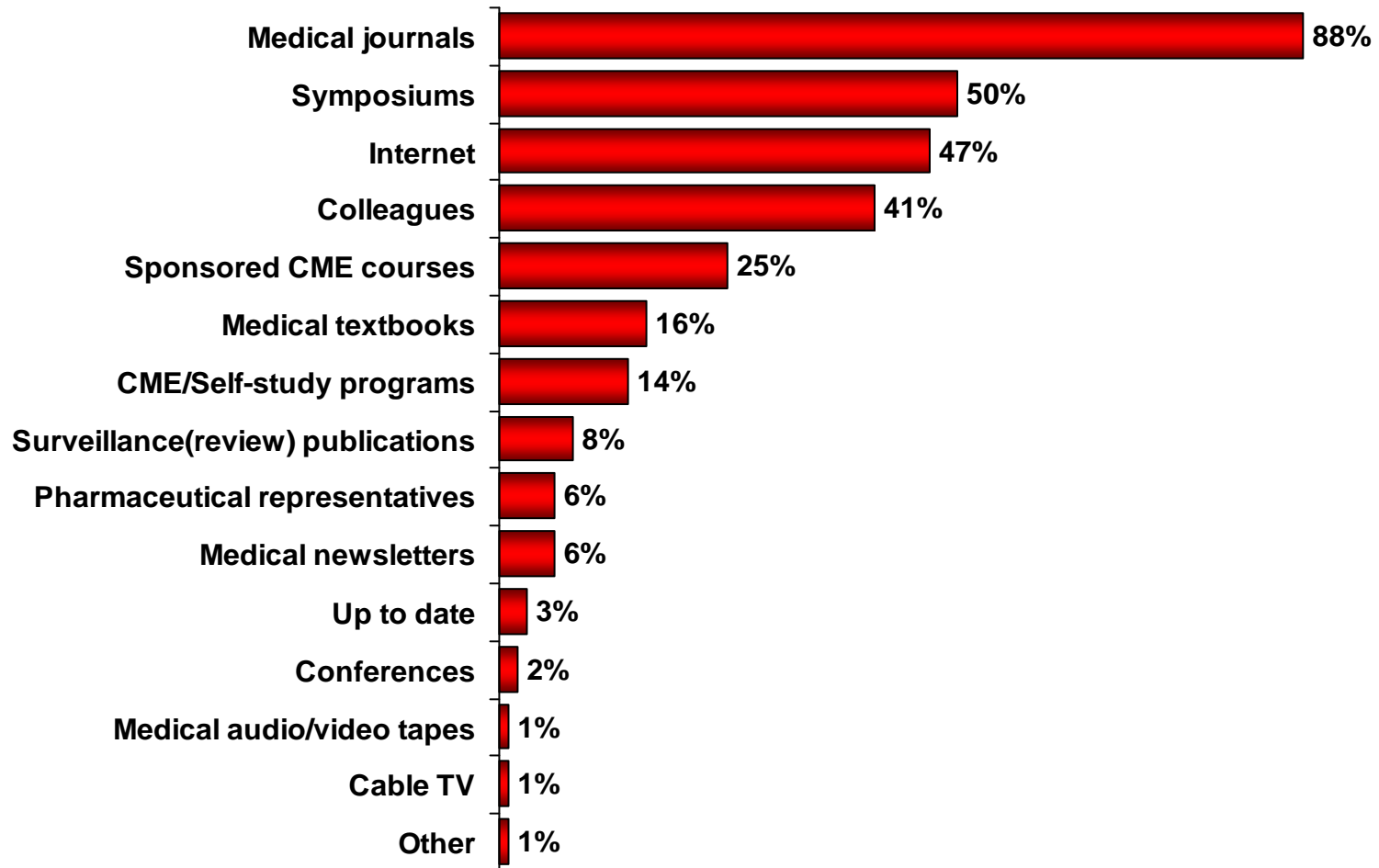
- **Over 80% of Canadian Physicians read one or more medical publications each week**
- **In an average month, this figure increases to over 95%**
- **In any two month period it reaches virtually 100%**

Over 95% of physicians read a medical journal each month



Information Sources For General Medical Knowledge - Total Mentions (1st, 2nd, and 3rd Rankings)

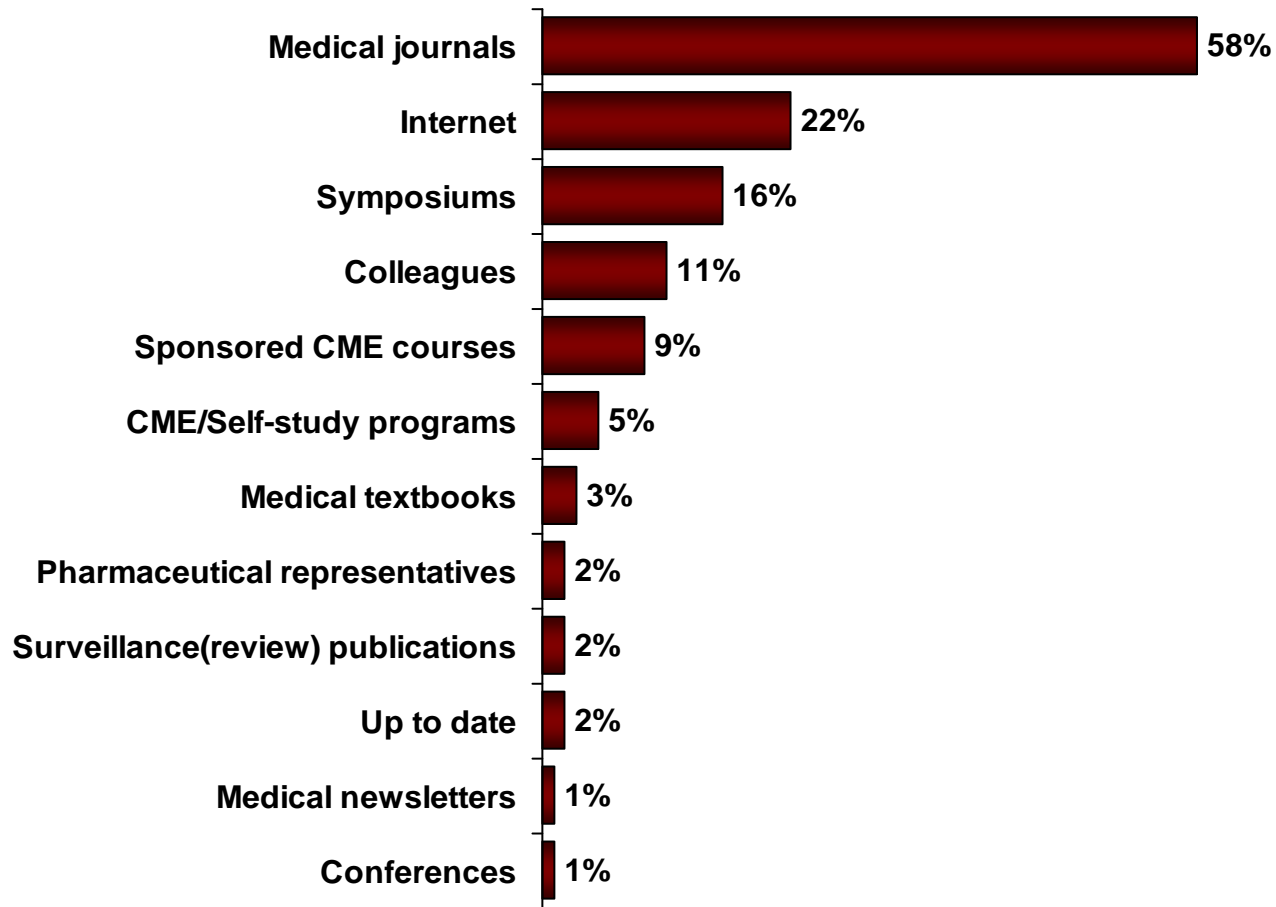
Total [n=623]



11. Please rank the top 3 information sources that you find most useful for general medical knowledge and keeping up to date.

Information Sources For General Medical Knowledge - Most Useful Source (Percent Ranking as #1)

Total [n=623]

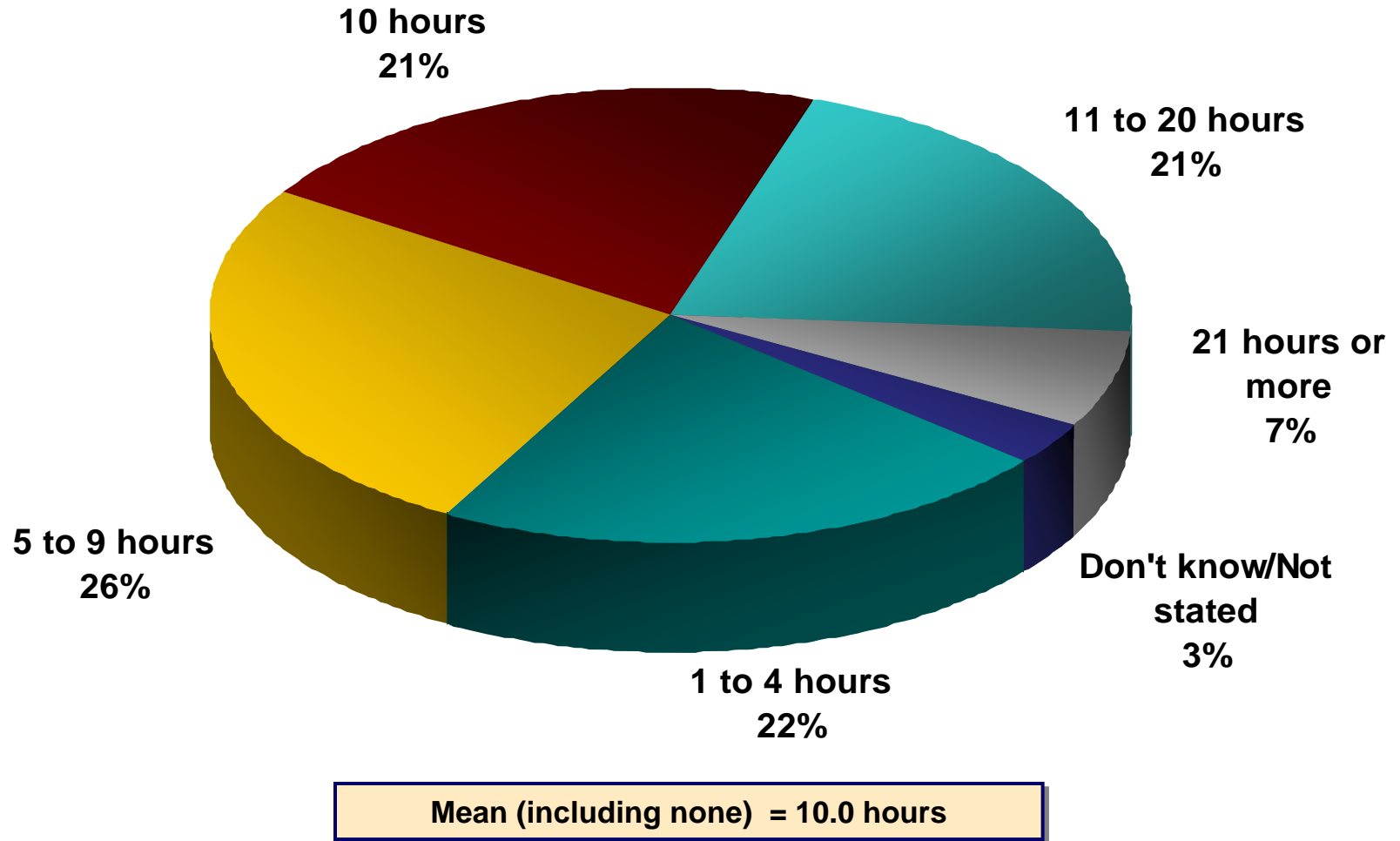


N.B.: Multiple mentions were accepted

11. Please rank the top 3 information sources that you find most useful for general medical knowledge and keeping up to date.

MEAN Number of Hours Per Month Spent Reading Medical Journals

Total [n=623]

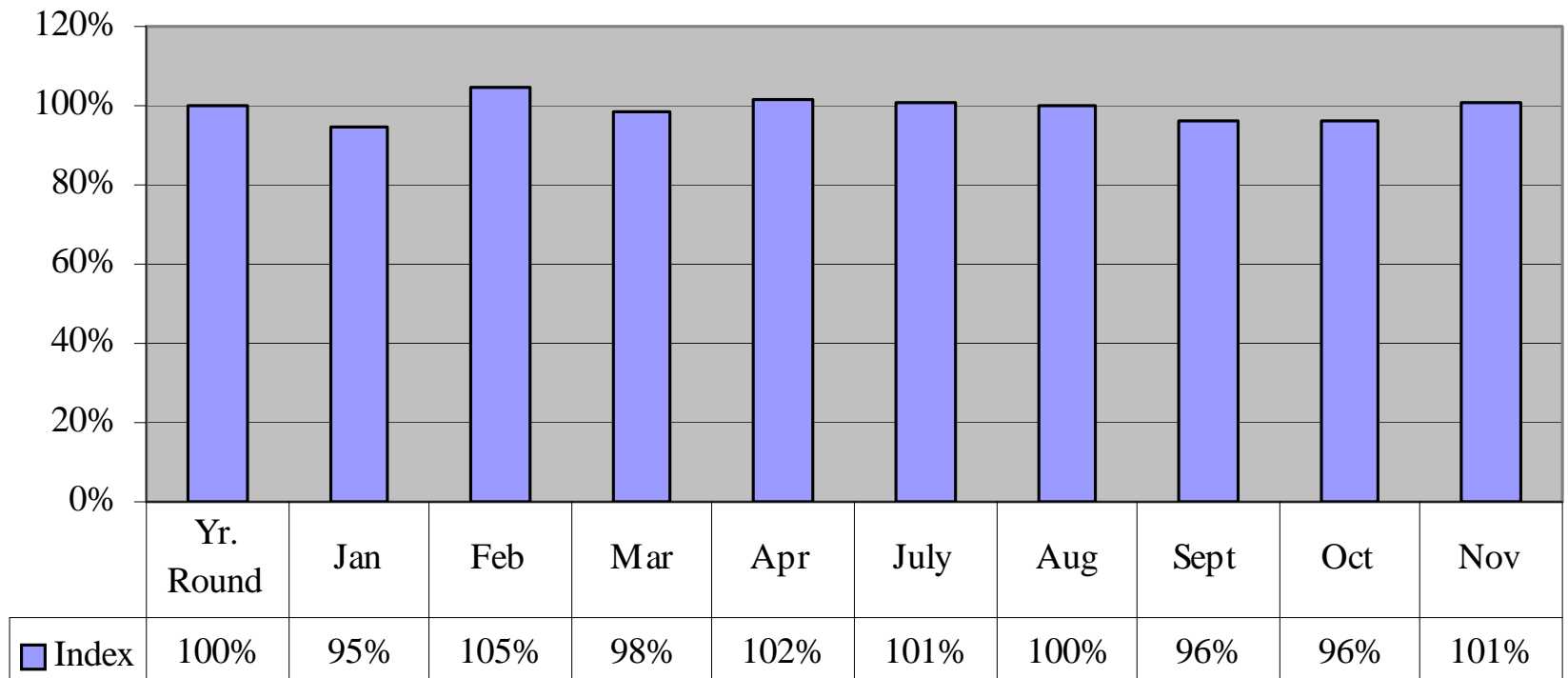


15. On average, how many hours do you spend each month reading medical journals?

Seasonality of Readership – by Month

Physicians read print publications all year round

Readership index vs year round average
PMB Medical Media Study 2008

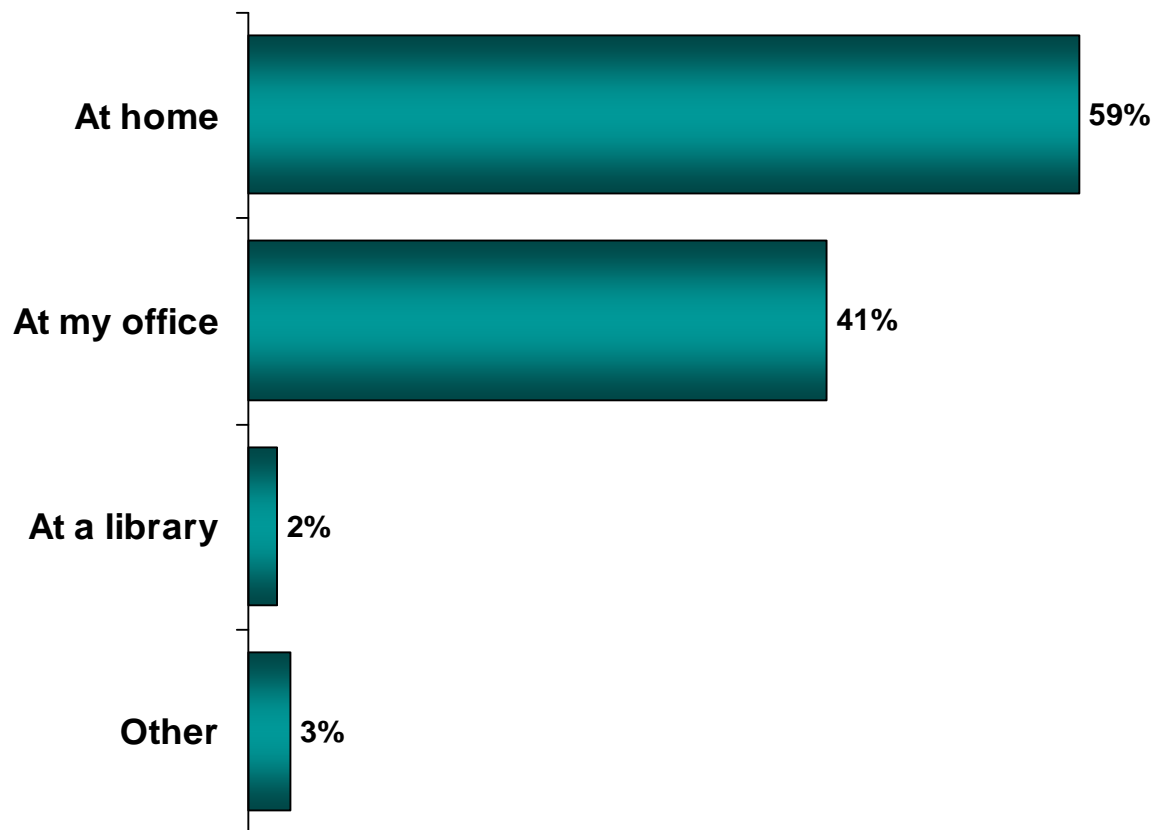


Survey not fielded during the months of May, June and December

SOURCE: PMB Medical Media Study 2008

Location Where Most Frequently Read Medical Literature

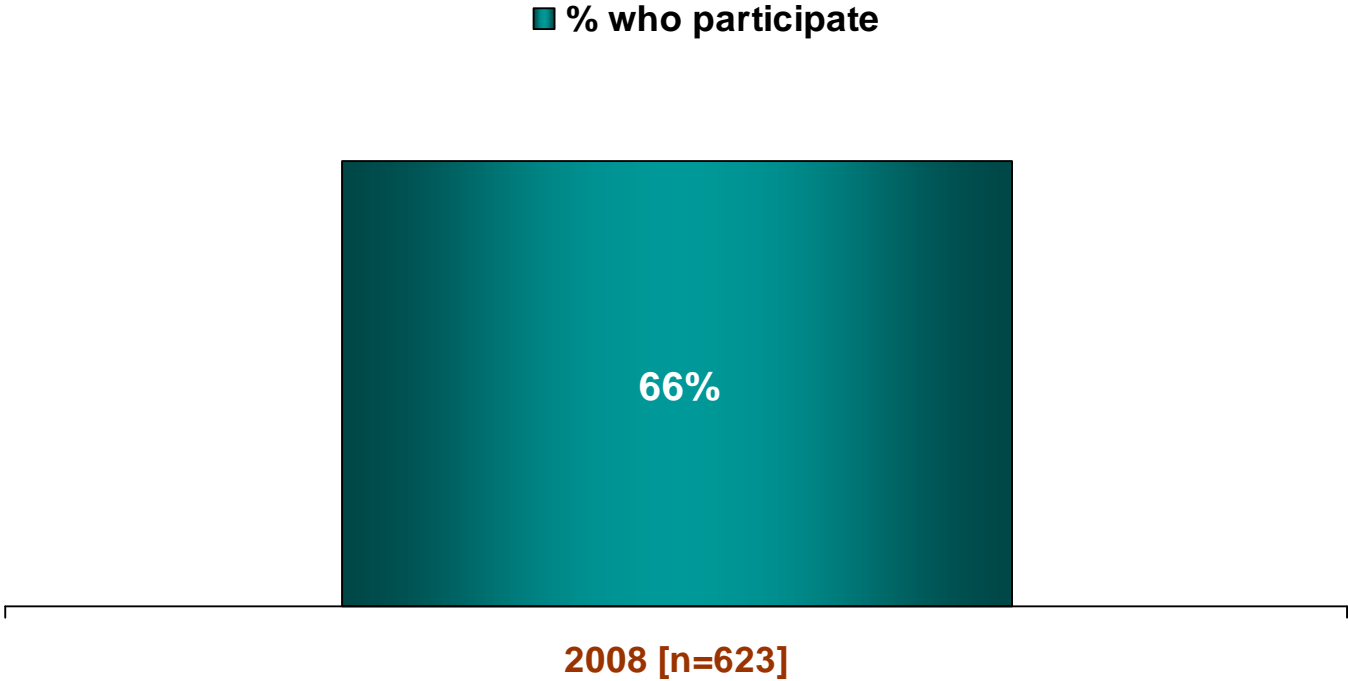
Total [n=623]



17. Please tell us where you usually read medical literature, selecting the most frequent location.

Percent Who Participate in Journal Club or Professional Studies Group

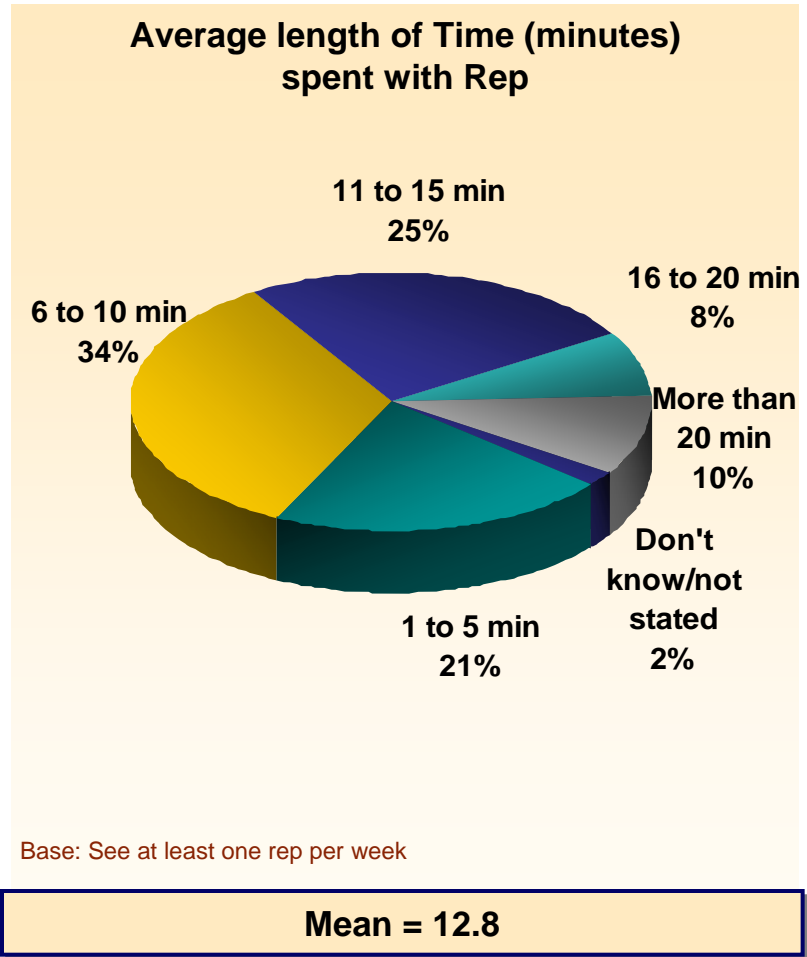
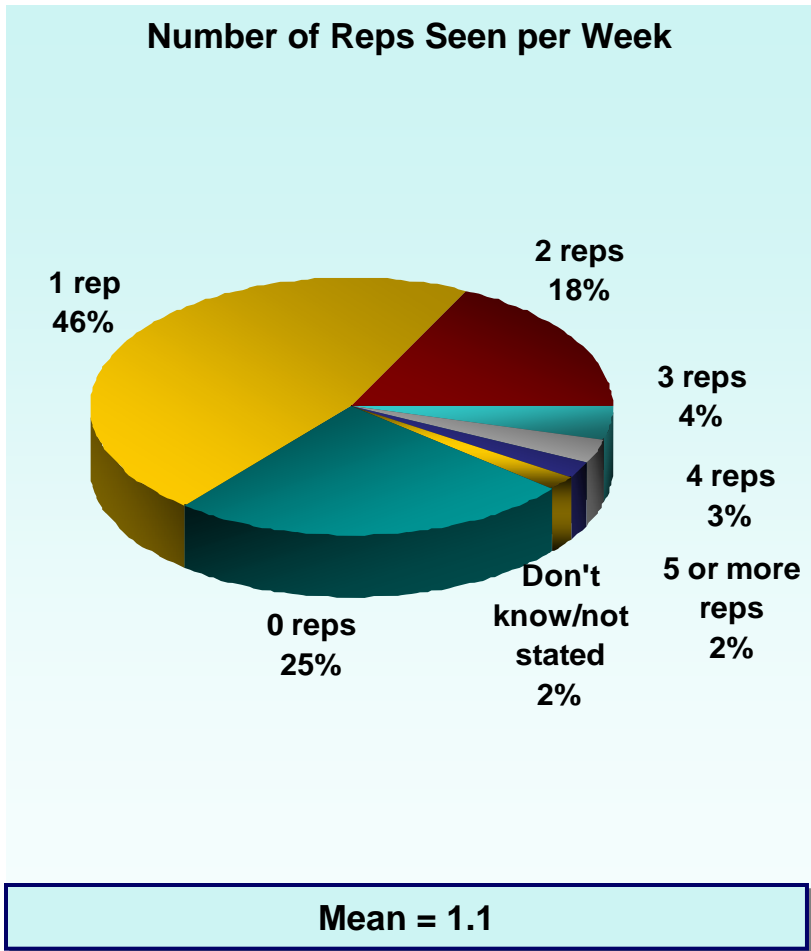
Total [n=623]



14. Do you participate in a Journal Club or a professional studies group?

Number of Pharmaceutical Company Representatives Seen Per Week, On Average and Average Length of Time Spent

Total [n=623]

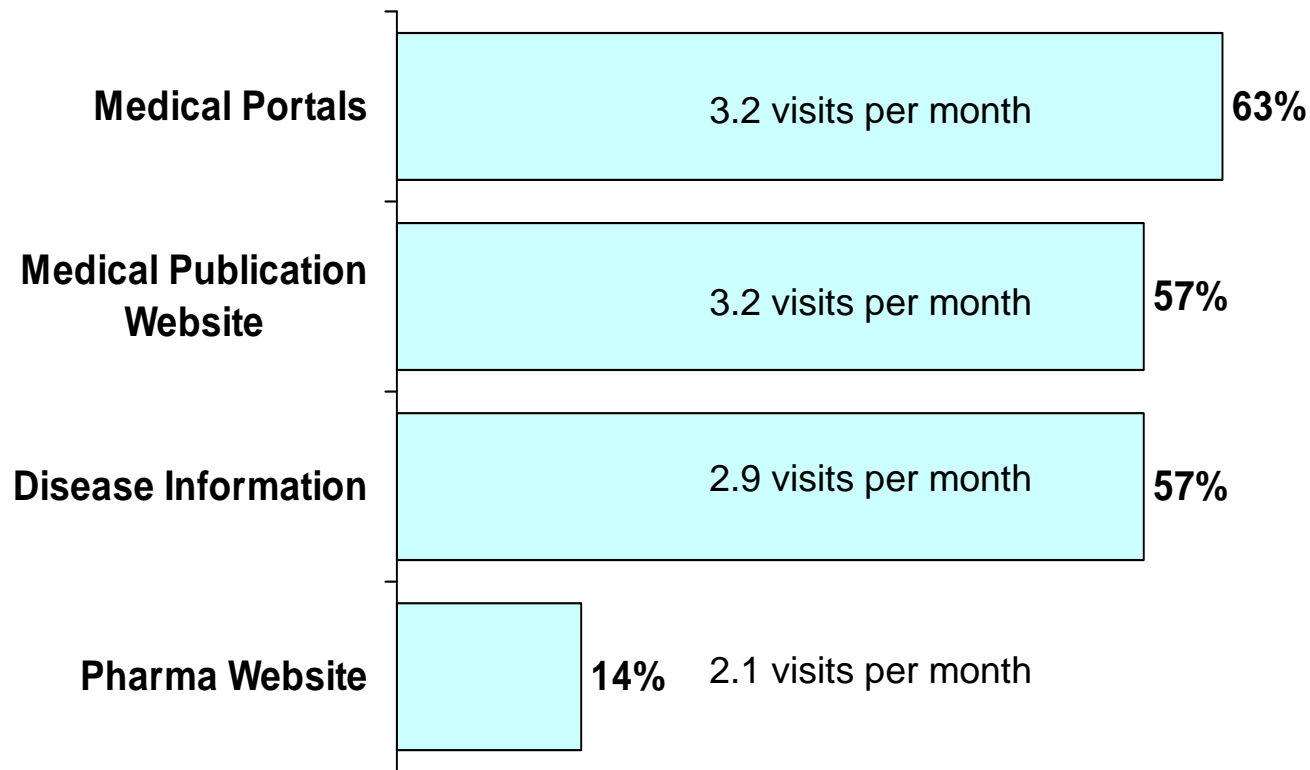


9. On average how many pharmaceutical representatives do you see per week?

10. Minutes spent per representative?

Physician Usage of the Internet

% Physicians Visiting and Average Number of Visits



Insights into Physician Media Usage 2007

Most important sources of information for staying abreast of new medical developments:

- 1. Medical Journals (4.10/5)**
2. CME: Attendance at Meetings (3.83/5)
3. Colleagues (3.68/5)

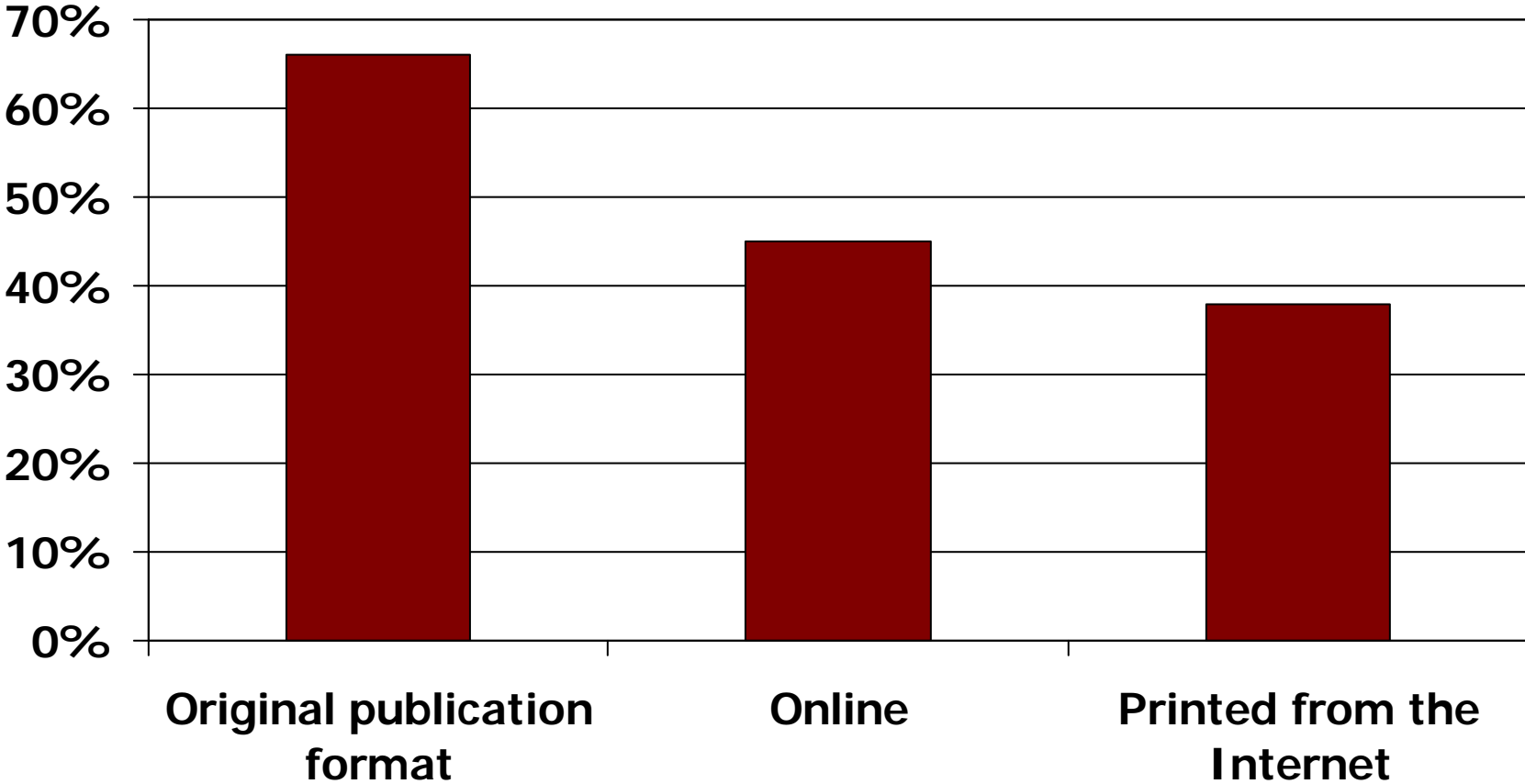
Highest reach among sources of information

- 1. Medical Journals (98%)**
2. Colleagues (95%)
3. CME: Attendance at Meetings (94%)

Use of Print by Age (Journals/Forms/Books)

| | Physicians <35 yrs | Physicians 35-44 yrs | Physicians 45-59 yrs | Physicians 60+ yrs |
|------------------------------------|-----------------------|-------------------------|-------------------------|-----------------------|
| Access/maintain medical records | 35% | 34% | 34% | 27% |
| Check formulary status | 17% | 15% | 23% | 28% |
| Complete CME credits/units | 31% | 47% | 49% | 42% |
| Find disease state codes | 34% | 28% | 29% | 29% |
| Find/perform clinical calculations | 14% | 17% | 20% | 21% |
| Prescribing | 62% | 52% | 52% | 49% |
| Read articles/abstracts | 72% | 70% | 71% | 68% |
| Reference drug data | 51% | 53% | 56% | 58% |

Medical Publication Versions Read



Base: 1,844, Source Table 318

SOURCE: Nielsen, Insights Into Physician Media Usage: 2007

From Which of the Offline Sources Would You Like to Learn about New Pharmaceutical Products or New Indications?



Canadian 2008 Essential Journal Study:

How Frequently do you use the following sources to keep informed about pharmaceutical products? (% selecting 'Often')

| | Cardiology (N=91) | Geriatrics (N=69) | Haematology (N=75) | Infectious Diseases (N=90) |
|---|----------------------|----------------------|-----------------------|----------------------------------|
| Medical Journals | 52.8% | 63.8% | 50.7% | 64.5% |
| Association-sponsored meetings | 44.4% | 45.4% | 52.7% | 42.2% |
| Formulary reports from hospitals or provinces | 21.0% | 36.8% | 15.1% | 25.3% |
| Manufacturer's representatives | 30.4% | 27.3% | 27.0% | 14.3% |
| | | | | |

Canadian 2008 Essential Journal Study:

How Frequently do you use the following sources to keep informed about pharmaceutical products? (% selecting 'Often')

| | Internal Medicine (N=119) | Nephrology (N=56) | Neurology (N=75) |
|---|---------------------------------|----------------------|---------------------|
| Medical Journals | 52.1% | 61.1% | 52.0% |
| Association-sponsored meetings | 39.6% | 45.5% | 51.3% |
| Formulary reports from hospitals or provinces | 27.6% | 26.8% | 19.1% |
| Manufacturer's representatives | 28.0% | 27.8% | 28.8% |
| | | | |

Canadian 2008 Essential Journal Study:

How many detail representatives do you see per week?

| | None | One | Two | Three | Four | Five or more |
|----------------------------|-------------|------------|------------|--------------|-------------|---------------------|
| Cardiology (N=92) | 15.2% | 39.1% | 22.8% | 9.8% | 5.4% | 7.6% |
| Geriatrics (N=70) | 34.3% | 45.7% | 10.0% | 4.3% | 4.3% | 1.4% |
| Haematology (N=78) | 38.4% | 47.4% | 10.3% | 1.3% | 1.3% | 1.3% |
| Infectious Diseases (N=94) | 44.7% | 44.7% | 9.5% | 1.1% | n/a | n/a |
| Internal Medicine (N=121) | 19.8% | 13.2% | 20.7% | 24.0% | 10.7% | 11.6% |
| Nephrology (N=56) | 25.0% | 46.4% | 17.9% | 8.9% | 1.8% | n/a |
| Neurology (N=75) | 29.3% | 52.0% | 13.3% | 1.3% | 1.3% | 2.8% |