

Worldwide Pharma Industry Marketing investment flat in 2013

Emerging countries sustain expenditure

Digital Promotion gains momentum

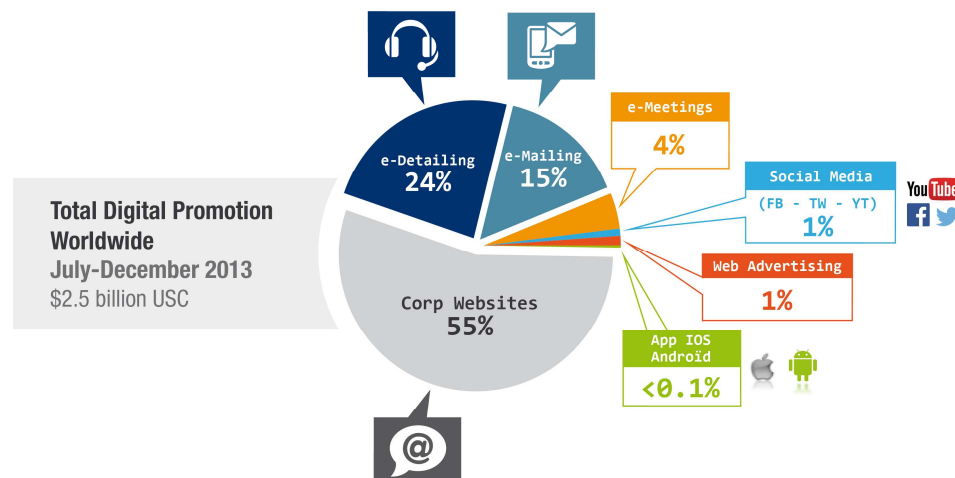
Paris, June 04, 2014 – [Cegedim Strategic Data](#) (CSD), a leading provider of healthcare market research, and worldwide promotional audits, has released results on pharmaceutical marketing investments for full year 2013.

Worldwide, industry investment in pharmaceuticals sales force and marketing channels remained flat in 2013, at just under **\$85 billion constant US dollars**. Notably, the leading 10 multinationals ranked by promotional expenditure, all reduced investment during the 12 months to December 2013.

“A combination of factors has led to a general consolidation in marketing activity,” commented Christopher Wooden – VP for CSD Global Promotion Audits. *“The impact of the so called patent cliff is still being felt as the industry seeks to maintain margins. Meanwhile, regulatory scrutiny and clearer compliance guidelines are putting pressure on the use of traditional, personal promotional channels. Finally, broad coverage primary care sales forces are being transformed to promote highly specialized portfolios. Consequently, fewer reps are needed.”*

Reduced marketing investment, however, was not universal. Major emerging countries saw increased expenditure including **China (+9%), Brazil (+11%), Mexico (+9%), South Korea (+4%)** and **Russia (+16%)**. Nevertheless, these increases were offset by cuts in the USA (-4%) and generally across Europe with spending in the UK down nearly 13%.

Globally, the use of “digital” channels such as e-detailing, e-mailing and e-meetings continued to expand with these three channels up over 14% over 2012 at \$1.9 billion constant US dollars. In the last 6 months of 2013, all digital channels tracked by CSD including pharma company websites, social media, web banner advertising in professional online journals and mobile apps came to nearly \$2.5 billion USD - approximately 6% of audited marketing expenditure.



Cegedim Strategic Data, Promotion Database 2014

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“In absolute terms, digital marketing investment is still a relatively small portion of the mix,” added Wooden. “However, we expect the use of these channels will only continue to advance as marketers seek to maintain reach through ease of access while delivering a high level of information quality to HCPs.”

About Cegedim Strategic Data:

Cegedim Strategic Data (CSD) is a leading market research company dedicated to the healthcare industry and operating worldwide.

With over 40 years' experience in the pharmaceutical industry, Cegedim Strategic Data offers a comprehensive range of market research services and solutions to its customers, which include more than 50 global and 500 local pharmaceutical companies. CSD integrates primary and secondary analyses with its medical expertise to meet its customer's research needs. To learn more, please visit our website: www.cegedimstrategicdata.com and follow Cegedim Strategic Data on Twitter [@CSDCegedim](https://twitter.com/CSDCegedim).

About Cegedim:

Founded in 1969, Cegedim is a global technology and services company specializing in the healthcare field. Cegedim supplies services, technological tools, specialized software, data flow management services and databases. Its offerings are targeted notably at healthcare industries, life sciences companies, healthcare professionals and insurance companies. The world leader in life sciences CRM, Cegedim is also one of the leading suppliers of strategic healthcare industry data. Cegedim employs 8,000 people in more than 80 countries and generated revenue of €902 million in 2013. Cegedim SA is listed in Paris (EURONEXT: CGM).

To learn more, please visit: www.cegedim.com and follow Cegedim on Twitter: [@CegedimGroup](https://twitter.com/CegedimGroup).

Contacts:

Pauline FAHEY

Cegedim Strategic Data
Marketing and Communications
Tel.: +33 (0)1 49 09 83 87
pauline.fahey@cegedim.com

Aude BALLEYDIER

Cegedim
Media Relations
Tel.: +33 (0)1 49 09 68 81
aude.balleydier@cegedim.com

Guillaume DE CHAMISSO

PRPA Agency
Press Officer
Tel.: +33 (0)1 77 35 60 99
guillaume.dechamisso@prpa.fr
