

## CSD Promotion audits reveal trend to “digital” in 2012

Global investment in online channels up 40% over 2011 while sales forces see major cuts in established markets

Paris, April 11, 2013 – [CSD - Cegedim Strategic Data](#), leading global provider of healthcare market research and worldwide promotional audits, has released results on pharmaceutical marketing investments for full year 2012.

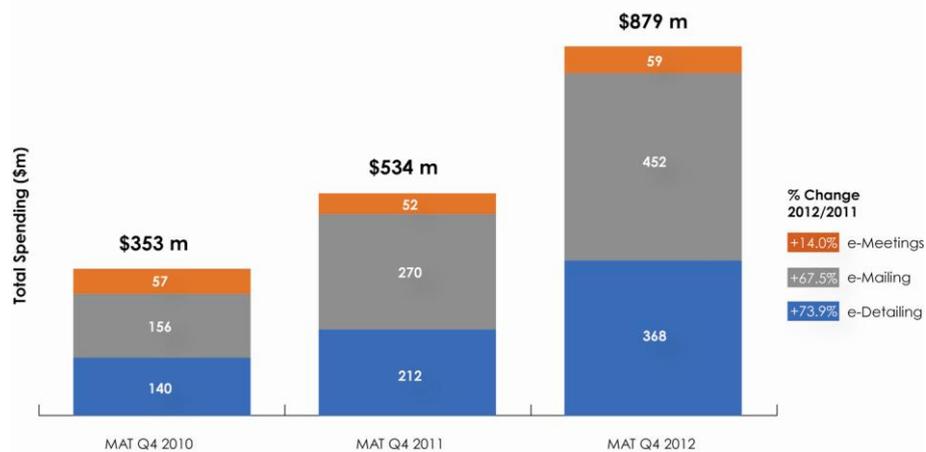
The trend to multi-channel marketing, with much attention focussed on “digital” channels gained pace in 2012 as pharmaceutical sales forces were cut in the US and Europe.

Worldwide, total promotional spending by the pharmaceuticals industry in 2012 was flat compared to 2011 at a projected \$90 billion USD.

Sales force reductions in the US (-10%) and the Europe Top 5 (-12%) were offset by continued increased total investment in emerging markets. Promotional spending in Brazil was up 7% and China saw total marketing spend increase by 20% to nearly \$2 billion.

Notably, however, overall spending declines in established markets occurred as investment in digital channels surged in the same geographies. In the US, spending on e-detailing, e-mailing and Webinar /Webcast type promotion was up 65% over 2011.

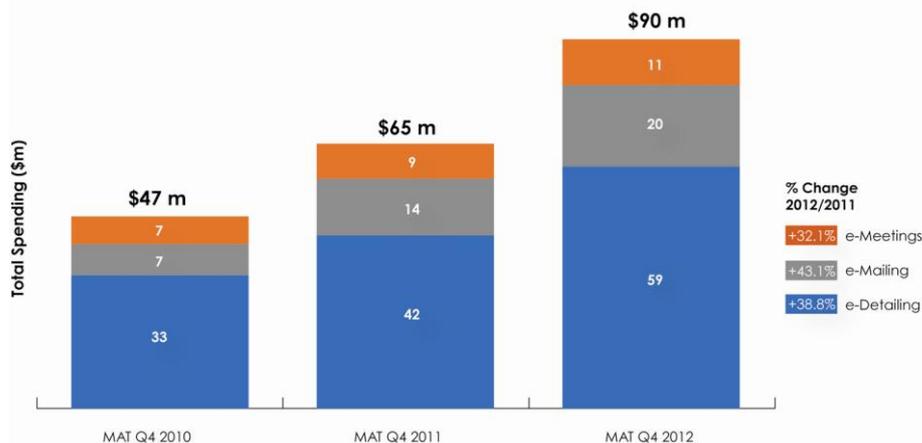
### USA E-Promotion Investment Trends



Source: Cegedim Strategic Data 2013

In the EU5 countries, spending on these same digital channels was up nearly 40%. While this growth is significant, “digital” marketing investment in Europe is only a fraction of what is spent in the US - revealing a lag in development as well as general acceptance among HCPs.

### Europe Top 5 E-Promotion Investment Trends



Source: Cegedim Strategic Data 2013

Commenting on these developments, Christopher Wooden, Vice President, CSD Global Promotion Audit observes: *“Two main factors have helped drive this move to digital: First, the reality of the patent cliff leaves companies with less money to invest in sales force. Secondly, technology has advanced to a point where its use as part of the multichannel strategy is becoming more attractive and less expensive. Pharma marketing in the US is clearly leading the way but we expect to see continued rapid expansion in Europe as well”.* However, he does not see digital as replacing sales force, Wooden continued: *“Nothing can replace the relationship value of face-to-face promotion but these new channels, when used cohesively, will augment and improve the overall client experience for 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](http://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 8,100 people in more than 80 countries and generated revenue of €922 million in 2012. Cegedim SA is listed in Paris (EURONEXT: CGM).

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

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