

Worldwide Pharma Industry Sales Force Trends

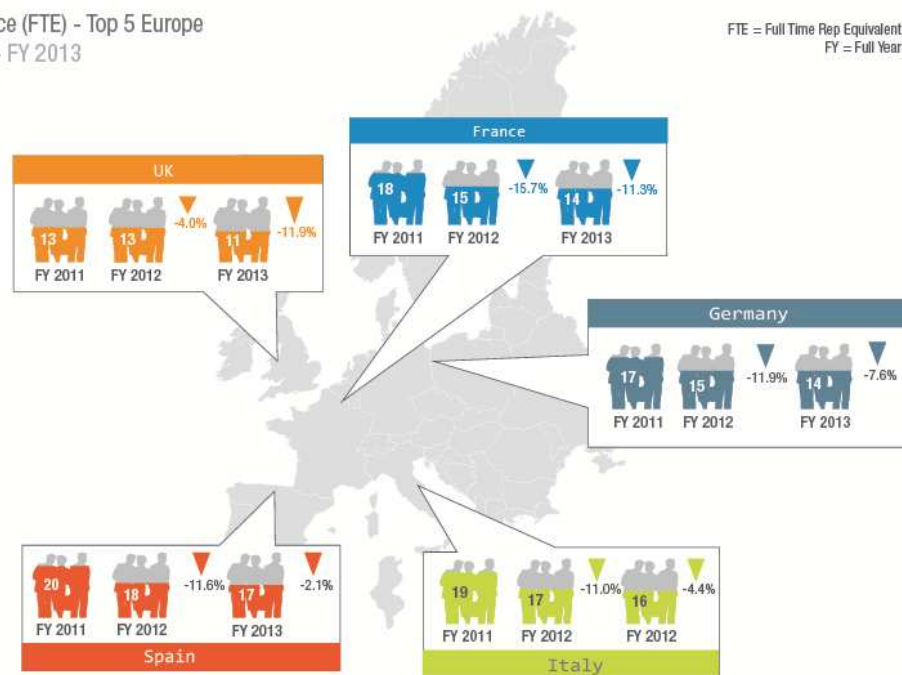
China and emerging markets continue to add reps while use of digital advances but volume remains low

Paris, April 10, 2014 – [Cegedim Strategic Data](#) (CSD), a global provider of healthcare research data and services, announces a 1.2% decline in 2013 in Worldwide Pharmaceutical industry sales force levels.

CSD's measurement of 2013 sales force levels shows a continuation of regional trends seen in 2012. Worldwide, sales force levels were down slightly at **424,000 full time rep equivalents** (FTEs) - a **1.2% drop** compared to 2012.

Decreases were most notable in **North America** where total FTEs stood at **66,000** as of Q4 2013 representing a **drop of 7.4%** over the previous 12 month period. Similarly, FTE audits for the **top 5 Europe** (France, Germany, Italy, UK and Spain) showed a **decline of 7%** to **72,000** reps. These regional trends reveal a continuation of cuts, although at a slower rate since 2012.

Sales Force (FTE) - Top 5 Europe
FY 2011 - FY 2013
(,000) FTEs



Cegedim Strategic Data, Promotion Databases 2014

Commenting on these dynamics, Christopher Wooden, VP Global Promotion audits for CSD noted, "Clearly, the impact of the patent cliff is still being managed by the industry. At the same time, broad primary care coverage is no longer needed as attention shifts to specialised treatment areas such as oncology."

Emerging markets and especially **China** were an exception however. Rep levels there jumped over **+9%** with some **95,000** FTEs measured as of Q4, 2013. Brazil also saw an increase with over 24,000 reps through 2013, up **+4.4%** over the previous year.

“In the broader context of sales force reductions, the use of digital channels is garnering attention as pharma companies must do more with less. CSD audits of online “digital” promotion showed a combined increase in 2013 of 14%. Nevertheless web based remote detailing was flat at just over USD \$1 billion invested worldwide. Increases were seen however for e-meetings and e-mailing – both channels with increases of over 35% in the 12 months to December 2013. Regarding digital channels”, Christopher Wooden added, “The industry is approaching this conservatively. It will be some time before the multichannel vision delivers the kind of impact currently hoped for and even then, the sales force will remain an essential part of the mix.”

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).

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