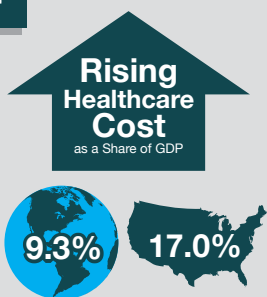


The Evolving Medical Affairs Landscape: 5 Global Trends

1

Rising Healthcare Costs



Patients Becoming More Active in Healthcare



72% of internet users look for health info online

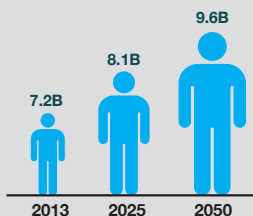
Medical Affairs is challenged to balance complex market dynamics including government and private/public insurance stakeholders.



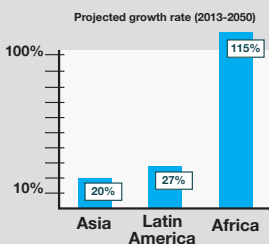
2

Population Growth & Emerging Markets

Population Growth



Majority Of Population Growth Specific To Developing Regions



The growing and changing global population creates new customers with increased demand for:



3

Advances in Technology

Time Pressures



Average patients seen per day by physicians

20

Med Info Stakeholders Are More Tech Savvy



US Physicians own or use a smartphone



US physicians own a tablet



Consumers viewing health-related reviews through social media



of smartphone owners have at least one health app on their phone



Healthcare professionals using social media for professional networking



Medical Information customers increasingly prefer self-service in their channel of choice, reducing cost for medical information support.

4

Changing Product Landscape

New Drug Approvals



Shift from Traditional Pharmaceuticals to Devices & Biologics



Increasing Spend on Specialty Care Drugs



41 new drugs and biologics were approved in 2014

24% of new approvals in 2014 were for biologics

2012: **\$87 Billion**
Expected in 2020: **\$400 Billion**

Increase in biologics and specialty care treatments means more complex scientific and medical demands:



Regulatory submissions



Patient inquiries



HCP education

5

Regulatory Scrutiny Reinforcing Role of Medical Affairs

Expanded Roles of Medical Affairs

Increased Vigilance Required To Avoid Non-Compliance and Penalty

- Med Information
- Med Education and Med Affairs
- Medical Strategy
- Med Communications/Publications
- Field-Based Medical Science Liaisons
- Adverse Event Identification
- Health Economics & Outcomes Research

2009

Off-Label Promotion
\$2.3 Billion

2010

Non-Compliant Sales/Medical Separation
\$600 Million

2011

Off-Label Promotion
\$203 Million
MSL/Off-Label Promotion
\$35 Million

2012

Off-label Promotion, misleading education
\$1.5 Billion
Dissemination of Misleading Info
\$3 Billion

Greater need for trusted partners who can provide regulatory awareness, expertise in global campaigns, and clear separation between promotion and medical activities.

Visit <https://www.c3isolutions.com/services/medical-information/> to learn more



An HCL Technologies Company

Sources:

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