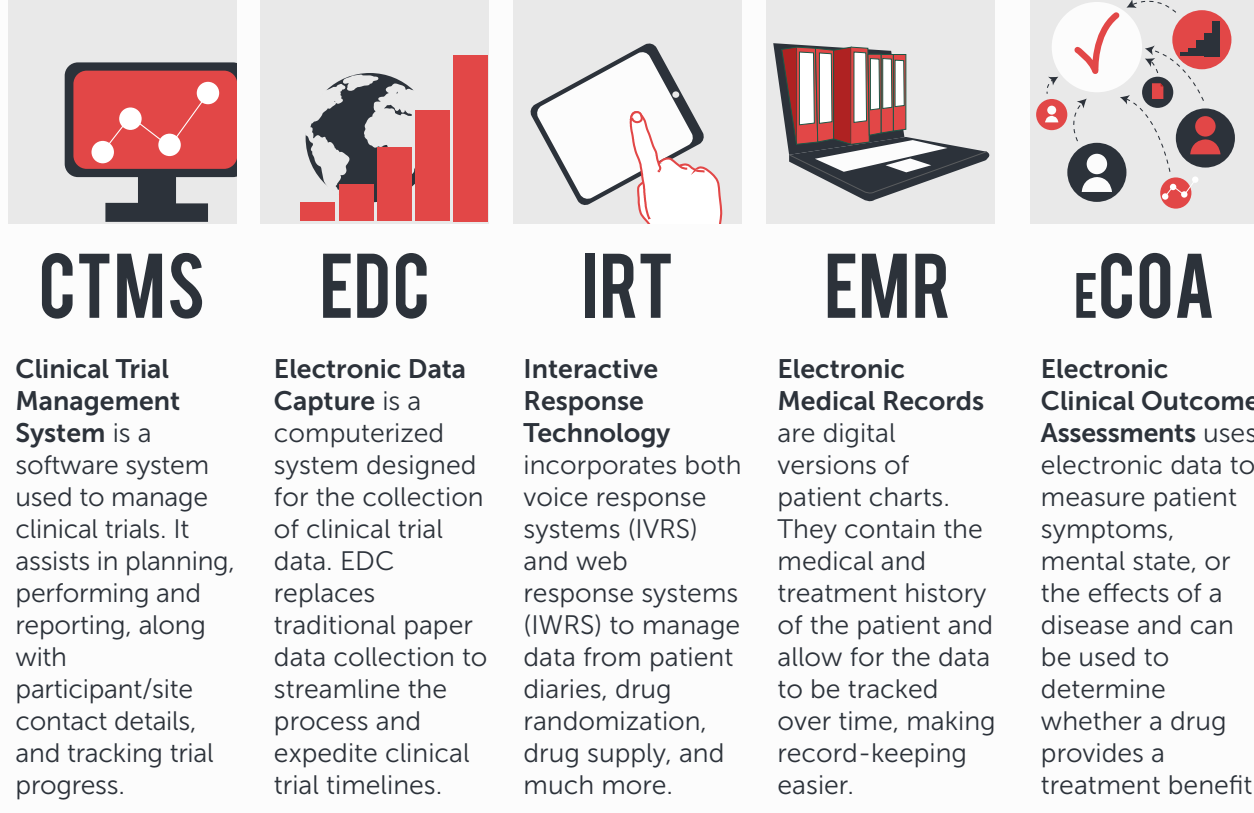


E CLINICAL

TRENDS, TIPS, AND TECHNOLOGY

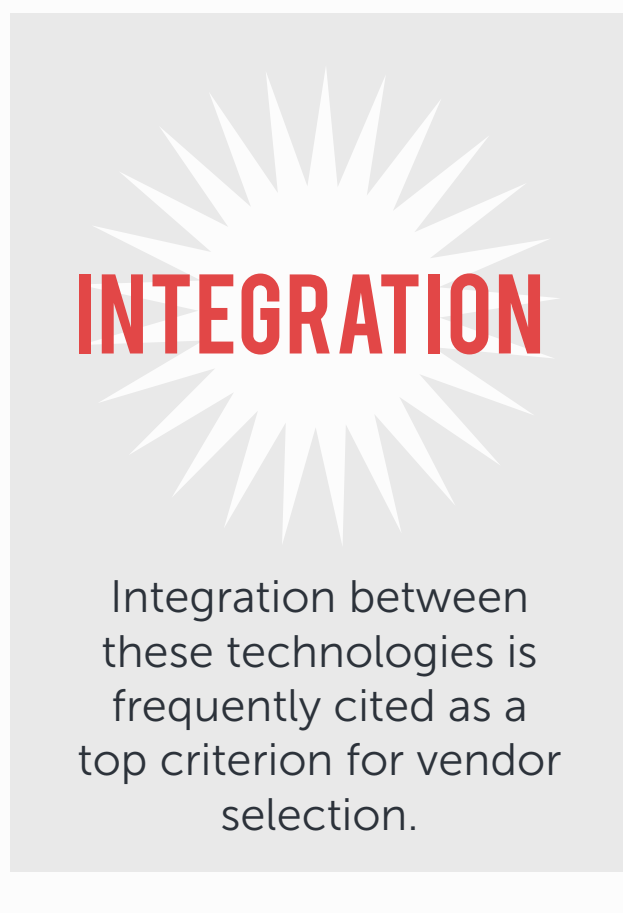
The term eclinical refers to a suite of services designed to automate clinical trials. These services can include:



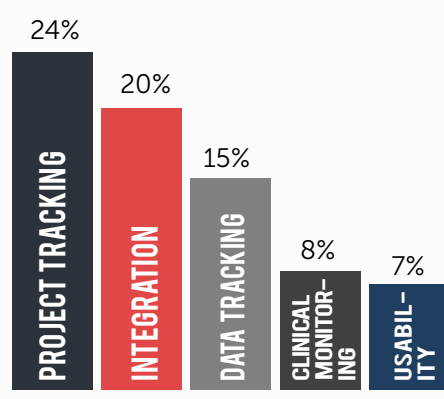
W eClinical technology is an area of the clinical development market that ISR expects will continue to grow while also consolidating.

- ISR's IRT Market Dynamics and Service Provider Benchmarking

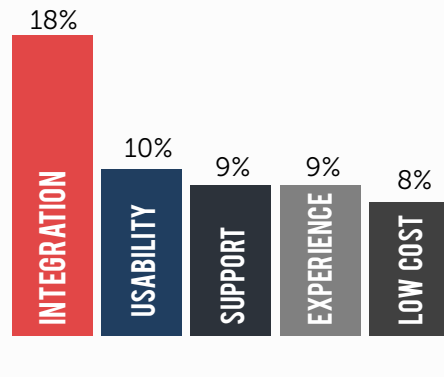
VENDOR SELECTION



TOP CRITERIA FOR **CTMS** VENDOR SELECTION



TOP CRITERIA FOR **IRT** VENDOR SELECTION

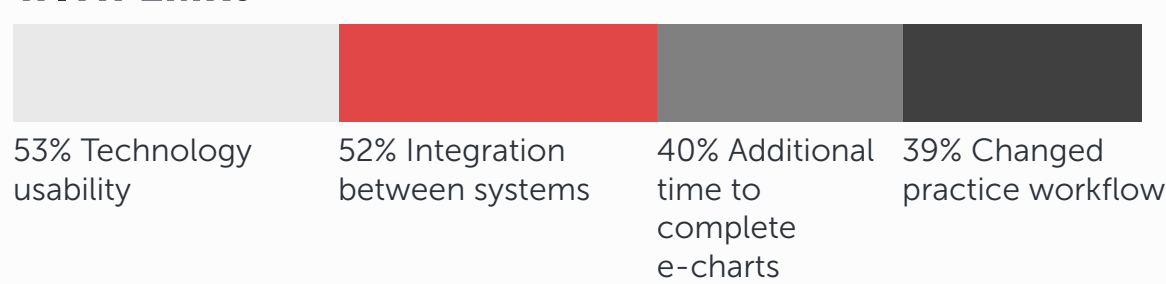


ROOM FOR IMPROVEMENT

W Perhaps integration as a pain point is a trend with technology in clinical trials or just a reflection of the state of technology adoption.

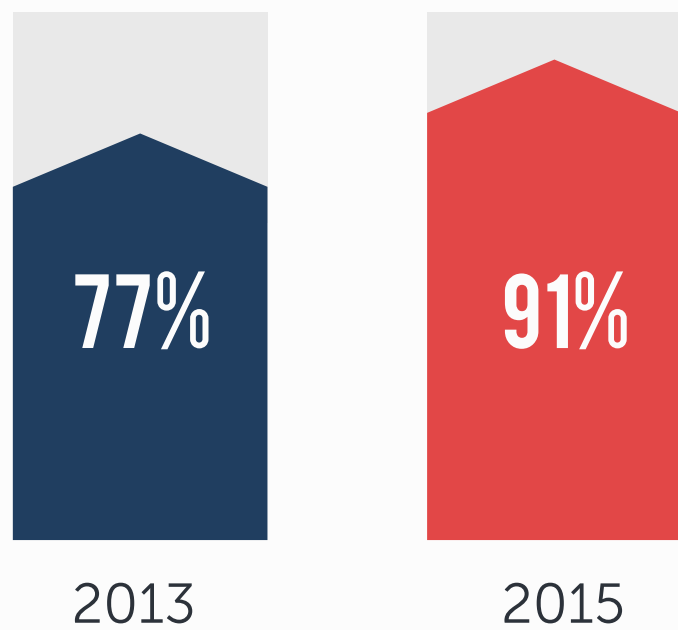
- ISR's EMRs and Clinical Research: Current and Potential Impact

% OF RESPONDENTS WHO REPORTED ISSUES WITH EMRs



FUTURE PREDICTIONS

RESPONDENTS SHOW AN INCREASING PREFERENCE FOR EDC TO PAPER DATA CAPTURE.



13.5%

CAGR of the eClinical industry through 2018

80%

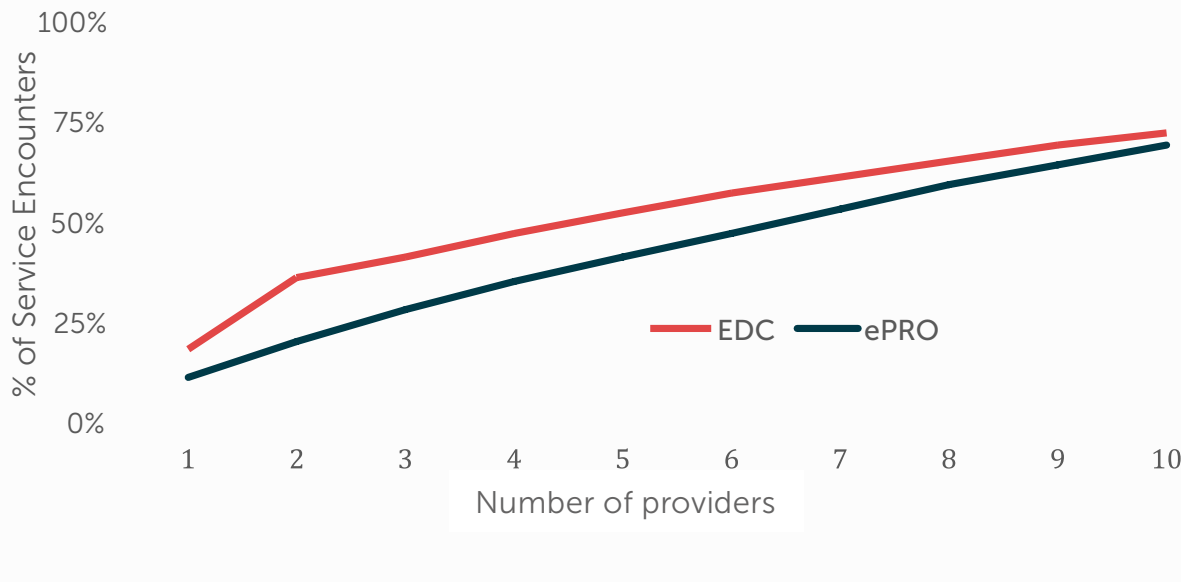
of trials will use an off-the-shelf IRT application in 2016

13%

increase in studies with an ePRO component in 2 years

AS THE MARKET FOR THESE SERVICES GROWS, SO TOO DOES THE SPACE FOR ADDITIONAL SUCCESSFUL PROVIDERS

In 2013, ISR found that 2 providers accounted for over 50% of the EDC service encounters of respondents. Similarly, 4 companies accounted for over 50% of eCOA/ePRO service encounters. In this year's report, 5 EDC providers and 7 ePRO providers make up over 50% of service encounters.



Learn more in ISR's full suite of **eclinical market research** reports: ISRreports.com

\$5 BILLION

WORTH OF THE ECLINICAL MARKET BY 2018

Sources: ISR research, ISR's 2015 EDC and ePRO/eCOA Market Trends and Service Provider Performance, ISR's CTMS Market Dynamics and Service Provider Benchmarking, ISR's IRT Market Dynamics and Service Provider Benchmarking, ISR's EMRs and Clinical Research: Current and Potential Impact, marketsandmarkets.com, clinicalleader.com



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