THE WORLD OF DRUG DEVELOPMENT TRENDS

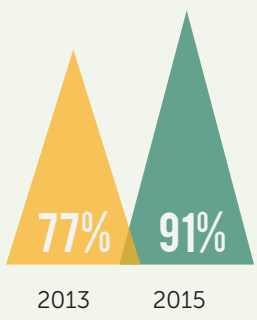
As many blockbuster drugs reach their patent cliffs, pharmaceutical companies and their service providers are searching to make drug development a more efficient process. Here are just a few of the trends to look for in the coming years.

TRENDING TOPICS

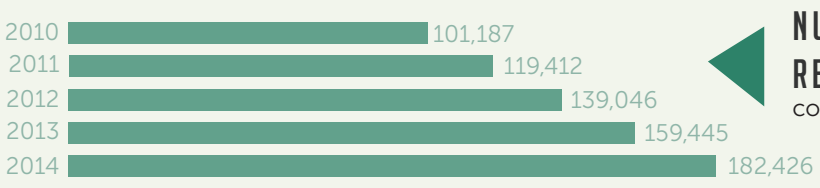
- Technology
- eClinical
- Risk-based monitoring
- Preferred providers
- Expansion into China
- Use of multiple countries
- Integration
- Complex trials
- Adaptive trials
- Orphan/Rare Disease

eCLINICAL

According to ISR Reports, respondents show an increasing preference for EDC over paper data capture.



Use of eClinical technology continues to grow, according to ISR's *EDC and eCOA/ePRO Market Dynamics and Service Provider Performance (2015)* and *IRT Market Dynamics and Service Provider Benchmarking* reports.



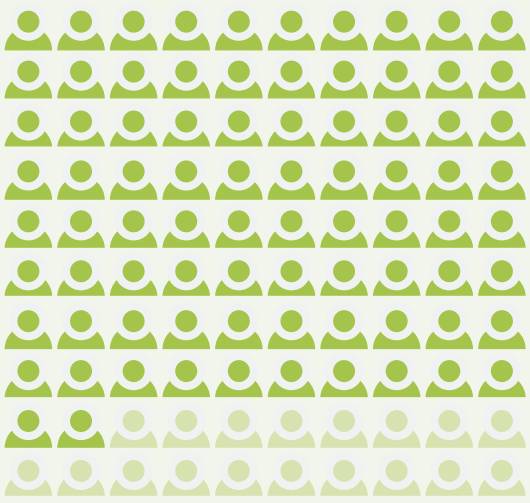
NUMBER OF REGISTERED STUDIES continues to rise each year.

of respondents will use EDC systems on Phase I-IV trials in two years' time.

ADAPTIVE TRIALS

Pfizer and Roche have joined ICON's consortium of drugmakers working on a new technology for adaptive clinical trials which would allow study sponsors to improve decision-making by reacting to data in real time.

82% of respondents reported that their company's perception of adaptive trial designs is at least "slowly gaining momentum"



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

of patient data will be collected primarily through electronic solutions in two years

OUTSOURCING

From 2015 to 2019, ISR is projecting the CRO market will grow at a 7.4% annual growth rate. ISR expects the CRO market will reach the $34B mark in 2019.

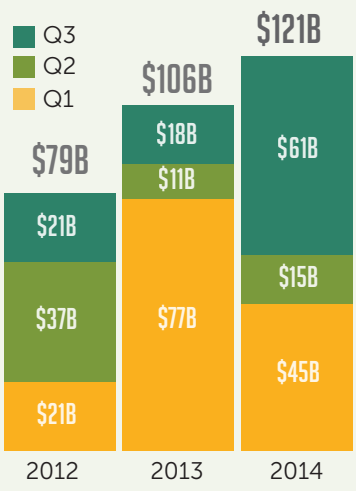
$251 BILLION

Size of the total R&D Market. CRO Revenue is 10.2% of that.

CONSOLI-DATION: m&a

Merger and Acquisition activity in the Pharmaceutical and Life Science Industry continues to be a trend.

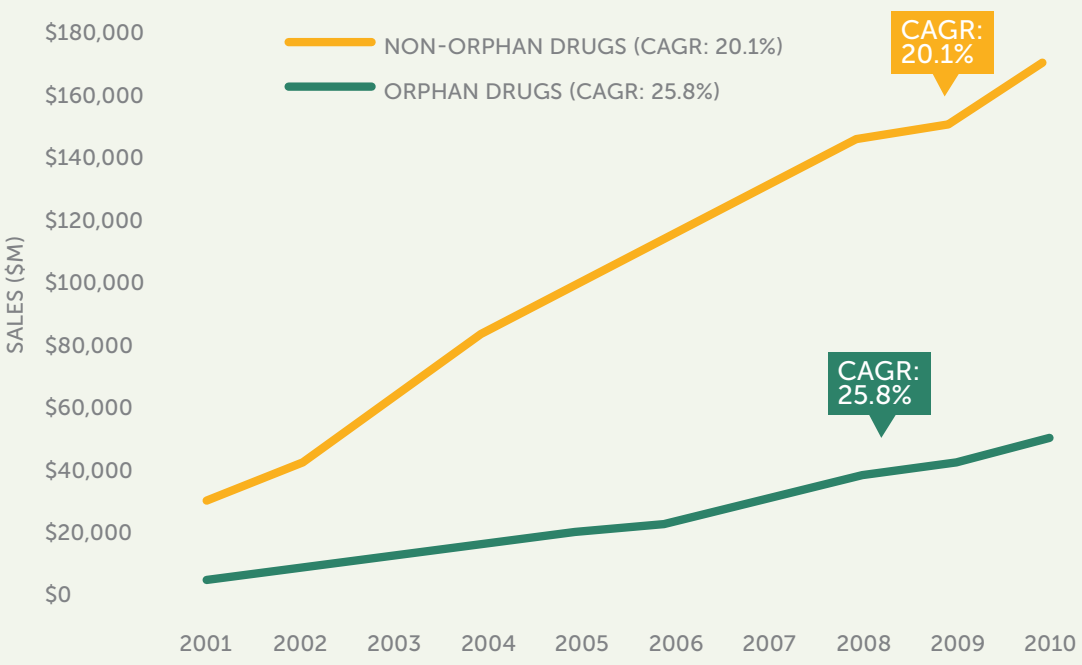
Total deal value (Q1-Q3):



ORPHAN DRUGS

As many blockbuster drugs reach their patent cliffs, drug makers are turning toward rare diseases (those affecting fewer than 200,000 people in the U.S.) for new products.

GROWTH RATE OF ORPHAN VS. NON-ORPHAN DRUG SALES (2001-10)



GLOBALIZATION

> *"The cost and competition faced when conducting trials in the US and EU has become overwhelming, and many biopharmaceutical companies are seeking new destinations for trial studies that offer opportunities to shorten clinical trial duration and reduce the cost per clinical trial subject."*
>
> - VLADIMIR MISIK
> VICE PRESIDENT, MIDDLE EAST, SITE MANAGEMENT, QUINTILES

RISK-BASED MONITORING

ISR surveyed biotech and pharma professionals about their current and future use of risk-based monitoring in clinical trials.

97% of respondents said their companies are at least somewhat interested in using RBM to run clinical trials.

15% said RBM is quickly gaining momentum within their organizations.

72% said their companies save money with a risk-based monitoring approach.

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Sources: clinicaltrials.gov, ISR Reports, Quintiles, Nature.com

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