

Physicians Value DIGITAL SALES AIDS

► **Trending now:** Survey of physicians reveals they want stronger and more custom content from sales aids.

WHILE MOST pharmaceutical representatives today are armed with tablet devices and direct sales aids (DSAs), many are not using them effectively during physician visits, according to a recent survey from Intouch Solutions.

Physicians are increasingly digitally savvy, with two-thirds of those surveyed owning two digital devices and 84% owning an iPad. Fifty-one percent of respondents reported seeing the same content presented more than once by the same rep. And two out of three physicians reported digital detailing content is not customized to their practices.

Based on these results, Intouch Solutions identified opportunities to dramatically improve the effectiveness of DSAs by focusing on meeting the needs of physicians and reps. These opportunities include:

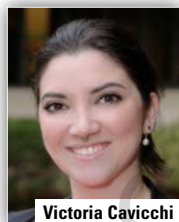
- Tailoring each call based on interaction data and insights gained over time
- Reframing, re-packaging, and shining a new light on key topics of interest, such as clinical data, to further engage HCPs
- Providing flexibility for reps to customize content for each visit and easily access information to respond on the spot

"As the survey results exposed, there are many opportunities to improve DSAs," says Faruk Capan, CEO of Intouch Solutions. "We look forward to addressing these opportunities in 2016 and beyond."



Faruk Capan

Patient-Reported Outcomes Now Used in Clinical Trials at Majority of Life-Sciences Companies



Victoria Cavicchi

As acceptance for patient-reported outcomes (PROs) grows among regulatory agencies worldwide, life-science organizations look to these self-reported measures to round out clinical trials. According to primary intelligence provider Cutting Edge Information, an average 66% of surveyed companies report implementing PRO measurements during clinical trials.

These patient-reported endpoints add to product value propositions as companies move through regulatory approval discussions and then pricing and reimbursement negotiations. Although PROs have not been highly popular in the last two decades, 68% of clinical trials at surveyed top 10 companies, 45% at surveyed top 50 and

90% at surveyed small pharmaceutical companies now implement these self-reported measures.

"While companies increasingly accept and embrace the value of the patient voice in clinical trials, teams can choose from a number of endpoints as they develop PRO instruments," says Victoria Cavicchi, senior research analyst at Cutting Edge Information. "Among surveyed companies, the majority report using eight metrics during clinical trials."

Perceptions of Clinical Trials

The Center for Information and Study on Clinical Research Participation conducted a global study on public and patient perceptions of clinical research. More than 12,000 respondents completed the survey.

The top perceived reasons for why people participate in research remain the same as in 2013: to find a cure or better treatment for illness (46%), to help scientists understand more about how to treat a disease/condition (33%), to receive com-

Therapeutic Trax

CNS

The Alzheimer's disease market will more than double from just under \$5 billion in 2014 to an estimated \$10.4 billion in 2021, at a CAGR of 11%. This growth, which will occur across the eight major markets of the U.S., Canada, France, Germany, Italy, Spain, the UK, and Japan, will be primarily driven by increased disease prevalence during the forecast period.

Source: GBI Research

Pain

The global opioids market is anticipated to garner \$42.16 billion by 2021. The global opioids market growth is mainly driven by increasing demand for opioids in non-cancer pain management, rising geriatric populations suffering from terminal conditions, uncontrolled prescription of opioids especially in North America, and increasing healthcare expenditure for post-surgical care. Moreover, the increasing incidence of trauma injuries, raising awareness about palliative care, higher efficacy of synthetic opioids, and favorable reimbursement policies are fueling the growth of the global opioids market.

Source: Persistence Market Research

pensation (29%), and to help others (28%).

Respondents report placing the most trust in the clinical research information provided on the online clinical trial registry maintained by their government. Similar to prior surveys, the majority of respondents perceive clinical studies to be safe (89%). While this proportion is somewhat lower than the proportion in the 2013 study (94%), the variation could be explained by the increased sample size and more geographically diverse sample in the 2015 study.

Respondents outside of North America are less likely to perceive clinical studies as safe, particularly in Europe where 16% of respondents report clinical studies to be "not very/not at all safe" compared with 9% of respondents who think the same in North America. Similar to findings in 2013, the possibility of side effects remains the top perceived risk (43%). **PV**

Oncology Corner...

► News and updates around cancer-related R&D, trends, services, and products.

Cancer Moonshot Forms National Pediatric Consortium



The Cancer MoonShot 2020 has formed a pediatric consortium focused on bringing the promise of combined immunotherapy as the next-generation standard of cancer care to children diagnosed with the disease. With leadership at Phoenix Children's Hospital helping to initiate this consortium, all founding partners will seek to apply the most comprehensive cancer molecular diagnostic testing available — integrating whole genomic and proteomic analysis — and leverage proven and promising combination immunotherapies and clinical trials through the QUILT (QUantitative Integrative Lifelong Trial) Program within the Cancer MoonShot 2020 mission.

According to the American Cancer Society, cancer is the second leading cause of death in children (after accidents) and an estimated 10,380 children in the United States under the age of 15 will be diagnosed with cancer in 2016.

New 10-minute Saliva Test Detects Cancer



Researchers at the California State University have developed a new test to detect cancer that takes just 10 minutes and uses just a drop of saliva. According to David Wong, professor of oncology at the California State University, the test is 100% accurate and can be done in the comfort of one's own home, or by a pharmacist or even dentist.

The test uses a technique called liquid biopsy. It works by detecting tumor DNA when it is circu-

lating in the body fluids. The test is a new way to detect cancer and costs less than \$20.

The researchers expect to begin a clinical trial using the new saliva test by the end of 2016 for prostate cancer. If all goes well, the new test is expected to be approved by the FDA within the next two years.

"With any cancer, early detection is key," says

Dr. David Samadi of the Dr. David Samadi Prostate Cancer Center. "For example, with prostate cancer the PSA test is currently the best tool to screen for and try to detect the disease early. If there were an early detection screening test widely available such as this that is non-invasive, cheap, and that is simple enough to be done in one's own home, we can save even more lives than ever before."

Cancer Trax

Brain Cancer

The glioblastoma treatment market will increase five-fold from \$659 million in 2014 to \$3.3 billion by 2024. This meteoric rise, which will occur across the seven major markets of the U.S., Spain, France, the UK, Italy, Germany, and Japan, will primarily be due to the launch of new therapies for glioblastoma patients with high unmet needs. Adults with glioblastoma have some of the highest levels of unmet need of any cancer patients.

Source: GlobalData

Lymphoma

The Hodgkin's lymphoma treatment market is set to increase more than four-fold from \$316 million in 2014 to \$1.4 billion by 2024, representing a CAGR of 16%. This growth, which will occur across the seven major markets of the U.S., France, Germany, Italy, Spain, the UK, and Japan will be attributable to label extensions for Seattle Genetics' Adcetris into earlier lines of treatment, and the launch of new therapies for relapse or refractory Hodgkin's lymphoma.

Source: GlobalData

Lung Cancer

The global non-small cell lung cancer market was valued at \$4.9 billion in 2014 and is anticipated to expand at a CAGR of 12.1% from 2015 to 2023 to reach \$15.1 billion in 2023. Angiogenesis inhibitors were the largest segment of the global non-small cell lung cancer market in 2014. High demand for Avastin in major geographies such as Europe and the United States is likely to propel the segment during the fore-

cast period. The angiogenesis inhibitor segment was valued at \$1.68 billion in 2014 and is likely to account for \$2.02 billion by 2023, expanding at a CAGR of 1.8% from 2015 to 2023.

Source: Transparency Market Research

Pancreatic Cancer

The treatment market for pancreatic cancer is set to grow from its current level of \$1.9 billion to an impressive \$2.9 billion by 2021, driven primarily by an increased prevalence of the disease. This rise, which will occur across the eight major countries of the U.S., the UK, France, Germany, Italy, Spain, Japan, and Canada, will come despite developments in diagnostics and a pipeline of promising new drugs. Six pancreatic cancer drugs are expected to gain approval within the forecast period, all of which have demonstrated significant improvement in progression-free survival and/or overall survival in clinical trials.

Source: GBI Research

Prostate Cancer

The global prostate cancer market is expected to increase from \$7.6 billion in 2014 to \$13.6 billion by 2021. Because the impact of novel therapies is likely to be minimal, this growth will be driven predominantly by the forecast growth in disease prevalence. Although expected to have a smaller impact on overall market growth than disease prevalence, the continued uptake of Zytiga and Xtandi for the treatment of chemotherapy-resistant metastatic castration-resistant prostate cancer is also expected to be a key driver throughout the forecast period.

Source: GBI Research