



▶ *New Technology is* **Driving Breakthroughs**

TRENDING NOW: Cloud-based applications, embedded analytics, and integrated systems are lowering pharma and payer costs and improving patient outcomes.

Life-sciences companies are aggressively embracing new technology-driven approaches to commercialize their products and reduce operating costs, according to a new report from the IMS Institute for Healthcare Informatics. The current technology wave in life sciences has the potential to drive transformational change over the next three years in overall healthcare system efficiency and the effectiveness of treatments.

The study finds that life-sciences companies are aggressively shifting their technology-based approaches to align cross-functional activities, optimize their organizations, and improve the effectiveness and agility of commercial teams. In addition, new investment is being focused on enabling greater patient engagement.

Overall, respondents expect continued cost reductions across the industry, and 40% pointed to planned cuts of more than 10% in their organizations during the next three years. In addition, 74% of survey participants are looking to derive greater value from the influx of healthcare information that includes anonymized electronic medical records (EMR) and other real-world data. New investments in a range of commercial operations applications, such as customer relationship management, social media or integrated multi-channel marketing solutions, were cited by more than 70% of respondents as a priority.

“Realizing the full benefit from new technologies will be a high priority for all life-sciences companies as commercialization approaches are revised amid changing customer demands and a growing need for efficiency,” says Murray Aitken, executive director of the IMS Institute for Healthcare Informatics. “Applications that are healthcare-specific, cloud-based, integrated, secure and analytically powerful will yield tremendous advantage to these organizations, and ultimately to patients and the health system overall.”

▼ For more information, visit theimsinstitute.org.



Murray Aitken

IMS Institute Key Findings

- » The largest global pharmaceutical companies will need to reduce combined operating costs by \$36 billion annually through 2017 to maintain their operating margins and current levels of R&D activities. A primary focus likely will be on sales, marketing, and administration costs, which amount to nearly 30% of net sales.
- » Integrated systems, cited by 85% of survey respondents as a need for optimizing their commercial organizations, are increasingly viewed as a means to improve workflow speed, eliminate conflicting data interpretations across departments, and reduce the cost of vendor teams managing manual data handoffs.
- » Life-sciences companies are shifting their primary data storage to the cloud, and investing in new sales and marketing-related applications. Seventy percent of participants expressed a need to use third-party, cloud-based applications.
- » Technology is enabling the healthcare industry to derive greater value from Big Data. Progress is being made to facilitate access to shared repositories in the cloud that can be used by multiple stakeholders to examine the burden of illness and understand the value of medicines.
- » Analytic systems designed to interpret and create actionable insights have not kept pace with the abundant and growing amounts of data generated or accessed by life-sciences companies.
- » Almost 60% of survey respondents rated patient apps as extremely or very important to address commercial challenges, while 69% similarly rated investments in physician apps.

Source: IMS Institute for Healthcare Informatics

Metadata Management is on **THE RISE IN BIOPHARMA**



Brent Carlson

Half of biopharma companies now have a metadata management project under way, according to a survey conducted by SOA Software. This finding shows that metadata management is emerging as a compelling solution for many biopharma businesses. The top drivers are data quality, regulatory compliance, and business process efficiency

improvements. Biopharma companies are seeking metadata management technology solutions more than ever. But only 10% of companies actually have a technology solution in place.

“Companies are realizing that by automating the implementation of standards through effective metadata management they can become more agile while reducing costs,” says Brent Carlson, senior VP for technology at SOA Software. “It’s clear that this has become an industry priority. Yet, the relatively low number of actual technology implementations shows that it can be challenging to find the right mix of process, people, and technology for the data lifecycle.”

The survey further revealed that 23% of all re-

THERAPEUTIC TRAX...

CANCER THERAPIES

At 18-months post-launch, more than 85% of surveyed oncologists have prescribed Roche/Genentech's Perjeta for metastatic HER2-positive breast cancer. Nine months following the launch of Roche/Genentech's Kadcyla, almost 80% of surveyed oncologists have prescribed the agent. Among surveyed oncologists who have not yet prescribed Perjeta or Kadcyla, the majority plan on prescribing these agents within the next three months.

Source: Decision Resources Group, LaunchTrends: Perjeta and Kadcyla (US)

▼ For more information, visit DecisionResourcesGroup.com.

CNS THERAPIES

Biogen Idec's Tecfidera has become the patient share leader among the oral options available for the treatment of relapsing forms of multiple sclerosis (MS) 10 months post-launch. Tecfidera currently captures 10% of weighted U.S. patient share compared with 7% for Novartis' Gilenya and 3% for Sanofi/Genzyme's Aubagio. With the oral DMT class uptake, platform injectable DMT shares continue to decrease. Regardless of the market changes, Teva's Copaxone and Biogen Idec's Avonex maintain their position as the patient share market leaders.

Source: Decision Resources Group

▼ For more information, visit DecisionResourcesGroup.com.

The epilepsy therapeutics market value in the eight major countries — the U.S., Canada, France, Germany, Italy, Spain, the UK, and Japan — will increase from \$3.4 billion in 2012 to \$4.5 billion by 2019, at a modest CAGR of 3.9%. The U.S. will grow at a higher CAGR of 4.8%, climbing from \$1.9 billion in 2012 to \$2.6 billion by 2019. Meanwhile, the five European countries and Canada will achieve a combined, smaller CAGR of 3.1% during the forecast period.

Source: GBI Research, Epilepsy Therapeutics in Major Developed Markets to 2019 - New AEDs with Novel Mechanisms of Action Signal a Shift in Treatment Patterns

▼ For more information, visit gbiresearch.com.

GASTROINTESTINAL THERAPIES

The gastrointestinal therapeutics market — covering irritable bowel syndrome, ulcerative colitis, and Crohn's disease in the major markets of the U.S., Canada, the UK, France, Germany, Italy, Spain, and Japan — was valued at \$6.8 billion in 2012. Over the forecast period of the analysis, this market is expected to decline at a negative CAGR of 0.3% to total \$6.6 billion in 2019.

Source: GBI Research, Gastrointestinal Therapeutics in Major Developed Markets to 2019 - New Drug Approvals and Promising Pipeline to Counter Declines from Patent Expiries

▼ For more information, visit gbiresearch.com.

RESPIRATORY THERAPIES

The global cystic fibrosis (CF) market value in the seven major countries — the U.S., Canada, France, Germany, Italy, Spain, and the UK — will jump from

\$1.2 billion in 2013 to just under \$4.5 billion by 2019, at a CAGR of 30.4%. The five European Union countries will show the most growth in the CF market, with their total value climbing from \$568 million in 2013 to just more than \$2.2 billion by 2019, at a CAGR of 32.3%. This will be followed by the U.S., with its CF market value expected to increase from \$636 million in 2013 to \$2.2 billion by 2019, at a CAGR of 28.6%.

Source: GBI Research, Cystic Fibrosis Therapeutics in Major Developed Markets to 2019 - CFTR Modulators Initiate Drive Towards Personalized Treatment and Market Growth

▼ For more information, visit gbiresearch.com.

VACCINES

The global prophylactic human papillomavirus (HPV) vaccine market value is forecast to experience moderate growth over the coming years, climbing from \$1.7 billion in 2012 to \$2.2 billion by 2022, at a CAGR of 2.6%. Out of the nine major markets — the US, Canada, France, Germany, Italy, Spain, the UK, Japan, and Australia — HPV vaccine sales in Canada and Australia are expected to grow at the largest CAGRs of more than 9% during the forecast period. This will be driven by the launch of Merck's V503 vaccine and the inclusion of males in routine HPV vaccine recommendations.

Source: GlobalData, PharmaPoint: Prophylactic Human Papillomavirus Vaccines - Global Drug Forecast and Market Analysis to 2022

▼ For more information, visit globaldata.com.

spondents (36% of those with existing metadata management projects) reported that they are not satisfied with their current or planned solutions, while another 7% think their solution suffices for now, but have concerns about it meeting their long-term needs.

▼ For more information, visit soa.com.

Telehealth Monitoring to see

STRONG GROWTH


The U.S. patient monitoring market was valued at

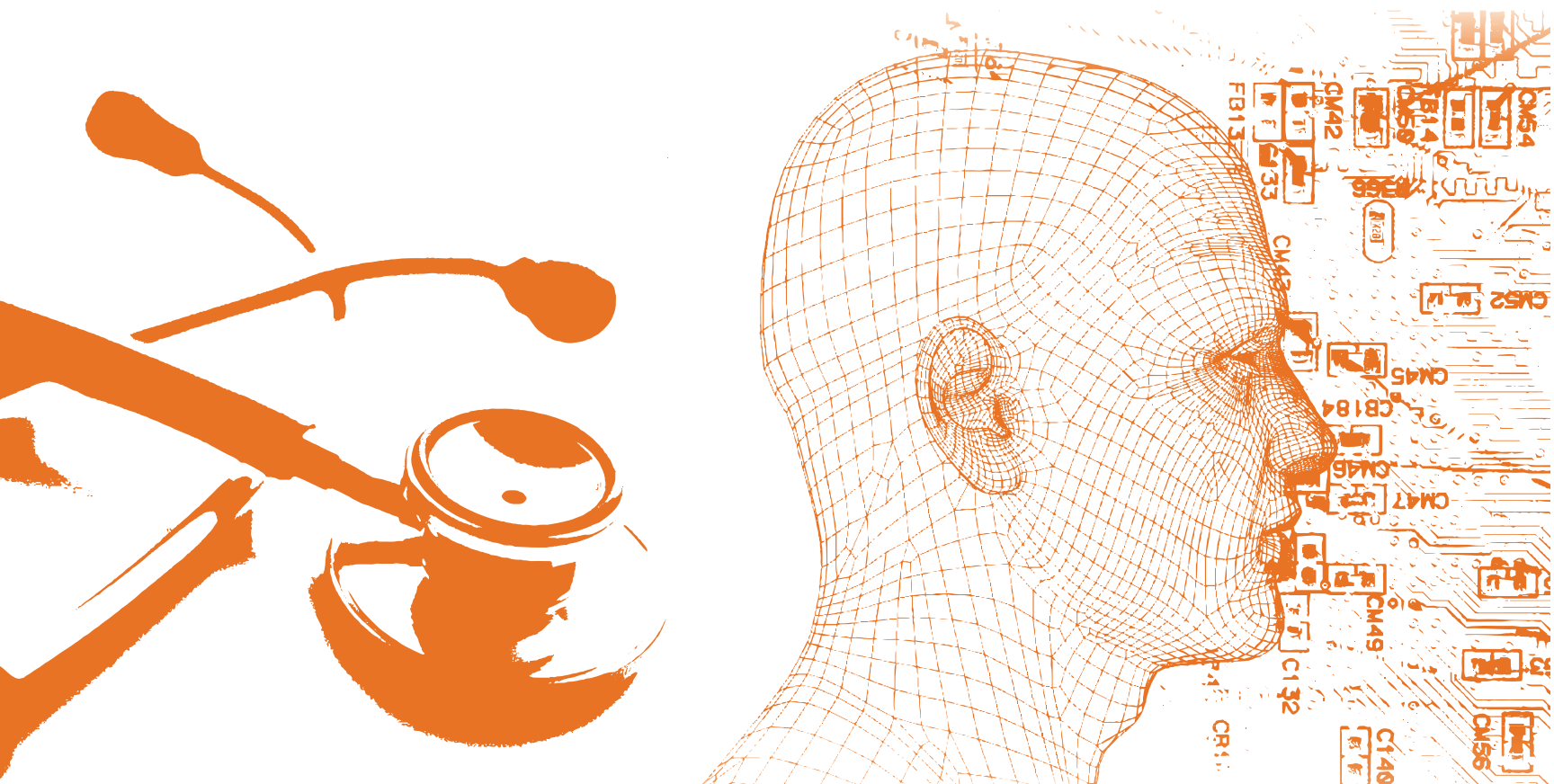
more than \$3.5 billion in 2013 and will grow to more than \$5.1 billion by 2020 due to the most notable expansion of multi-parameter vital sign monitors, electroencephalograms, electromyograms, cerebral oximeters and, pulse oximetry devices, according to a new report by iData Research.

With the mounting pressure to decrease healthcare costs, patients are moving out of hospitals to alternate care sites earlier, making patient monitoring devices essential to their continued post care. Patient monitoring is becoming increasingly more mobile and prevalent in homes due to the various cost-saving measures. This mobility is

making a significant impact on preventing unnecessary patient deaths in hospitals and alternate care sites as well as re-admission of patients recovering at home.

"There has been a surge of interest in implantable electronic devices," says Dr. Kamran Zamanian, president of iData Research. "Remote monitoring of these devices by doctors and caregivers could significantly reduce in-office follow-up visits. Devices such as the cardioverter defibrillator could be lifesaving."

▼ For more information, visit idataresearch.com. 



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