



Success

Solution

Business Strategy

Innovation
Branding
Solution
Marketing
Analysis
Ideas
Success
Management

Kineticos – Market Research Study

27 September 2018

Innovation
Branding
Solution
Marketing

● SOCIAL NETWORK



About Kineticos

Kineticos is a specialized management consulting firm serving the life science industry. The firm is focused on identifying opportunities to drive strategic growth and achieve operational excellence for its clients around the globe.

A Differentiated Approach...

- Specialized focus in life sciences
- Real world expertise from decades in industry
- Strategic thinking
- Tactical execution capabilities
- Systematic methods and processes



Kineticos Market Research Initiative

As a life sciences consultancy, Kineticos has the opportunity to engage with some of the brightest minds in the industry. We are privileged to have partnered with over 75 sponsors and are forever grateful for those relationships.

However, helping our sponsors with their most challenging issues is only one way Kineticos can contribute to improving patient outcomes. An additional way of doing so is to provide life science executives with insight regarding industry trends and future outlook. This insight can be utilized to make informed decisions and expedite the process of bringing life changing therapies to market.

Thus, Kineticos has recently conducted a primary research study intended to gain insight into current and future state of the biopharmaceutical industry. The subsequent slides highlight the findings of our research. We encourage you to provide any feedback and if there are topics that you would be interested in learning more about, please contact us as research@kineticos.com

Thank you!

The background features a dark purple and blue color scheme with a central image of laboratory glassware, including a large Erlenmeyer flask and several test tubes. Faint, glowing chemical structures and the word "Child" are visible in the background.

Fall 2018 Market Research Study

Confidence Across the Biopharmaceutical Industry

Research Specifications



Methodology

- 5 minute online survey



Sample

- n=79 Biopharmaceutical Executives



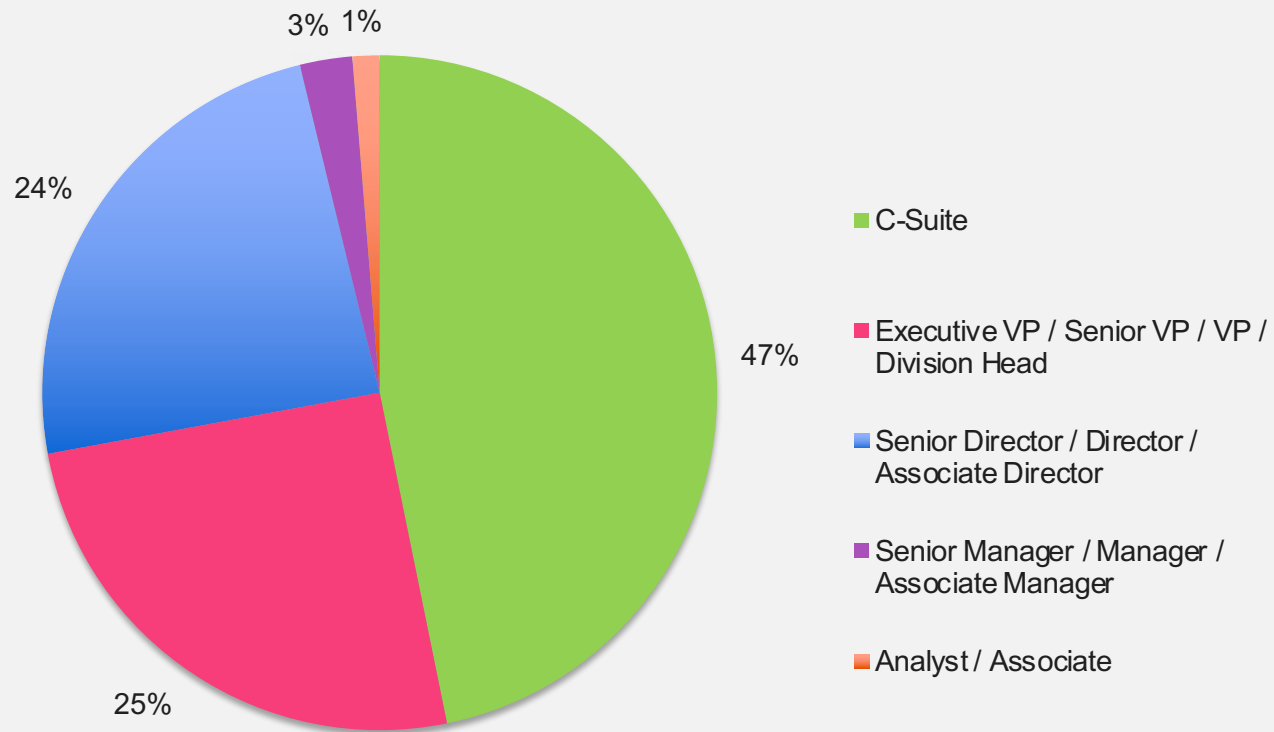
Timing

- Fielding was conducted between August 21, 2018 – September 9, 2018

Demographics

Individuals in C-Suite and VP roles accounted for 72% of respondents

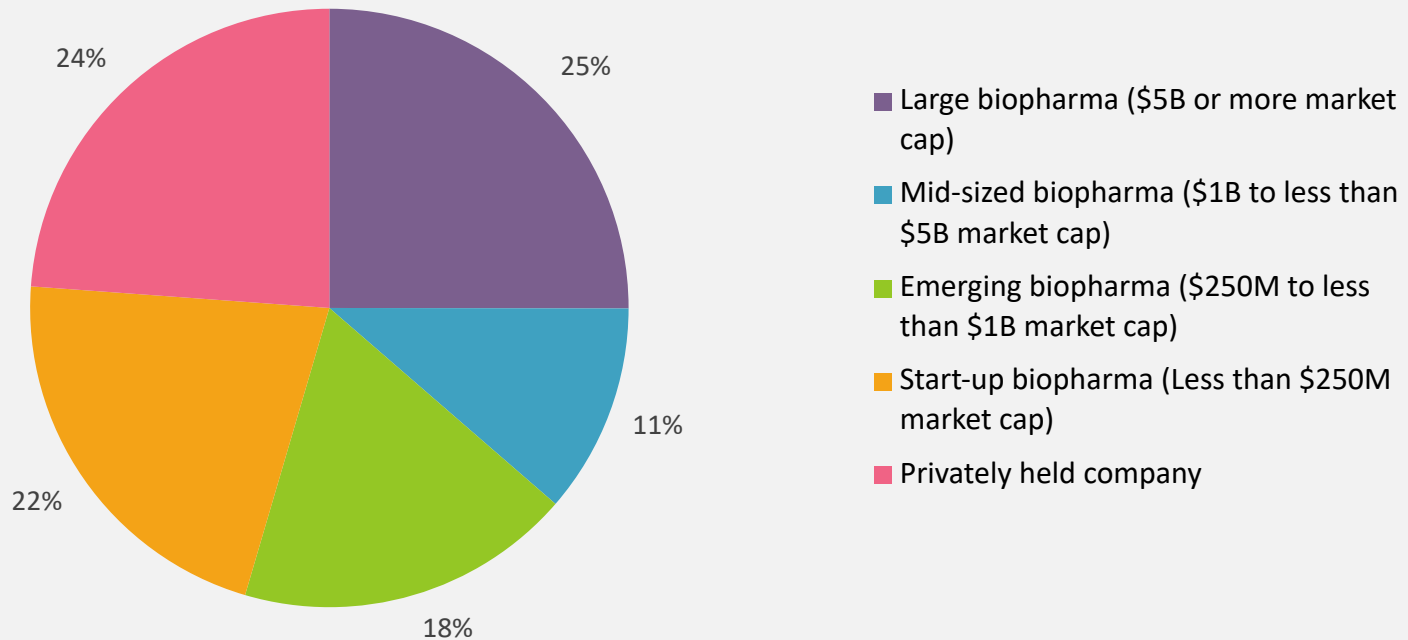
Please indicate your role in the organization.



N=79

64% of respondents represented companies with a market cap of less than \$1B

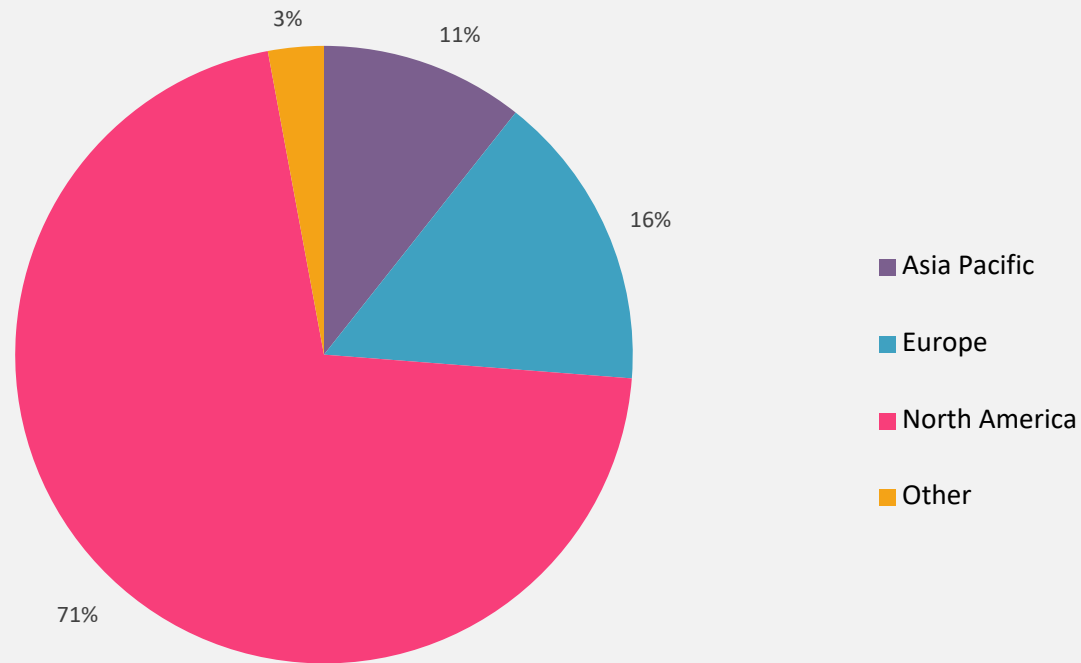
How would you categorize your biopharmaceutical company?



N=79

71% of the companies represented have a presence in the US

Please indicate which geographic region(s) your company is located.

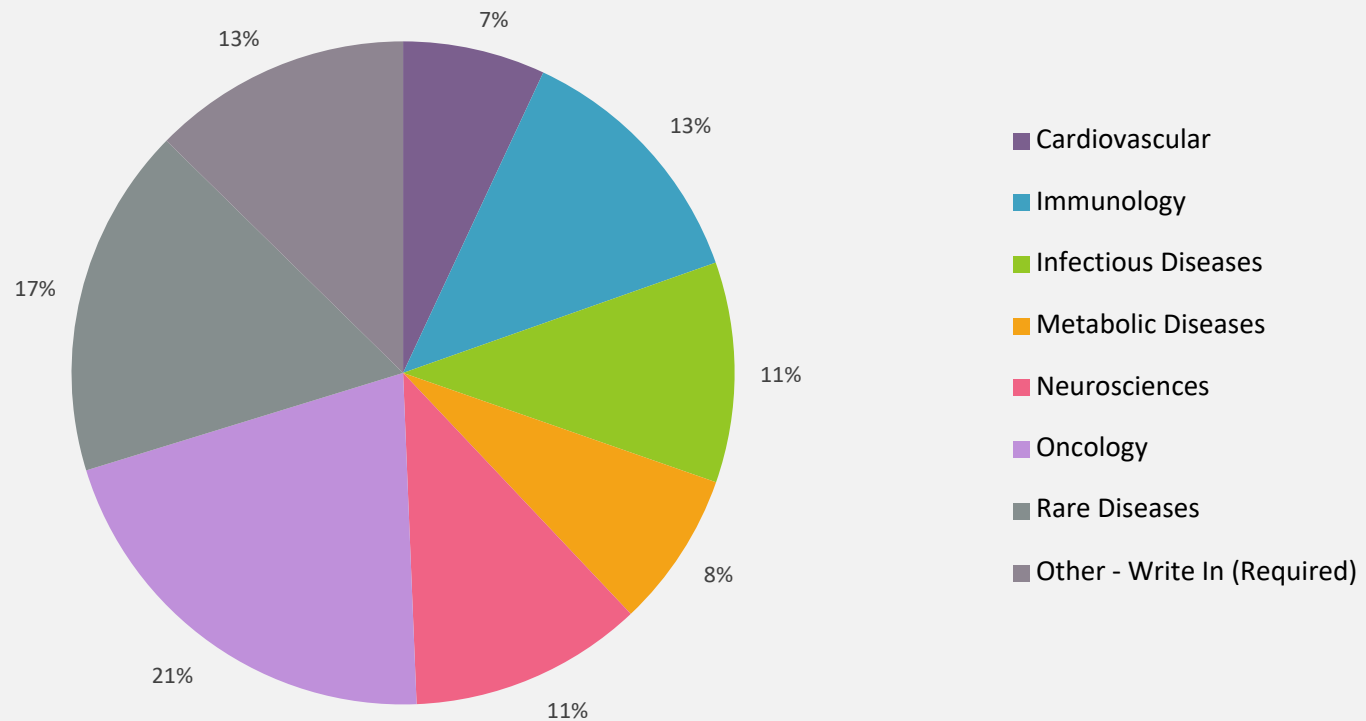


N=79

Other includes: South America (2x) and Latin America

Companies working in Oncology (21%), Rare Diseases (17%) and Immunology (13%) were well represented

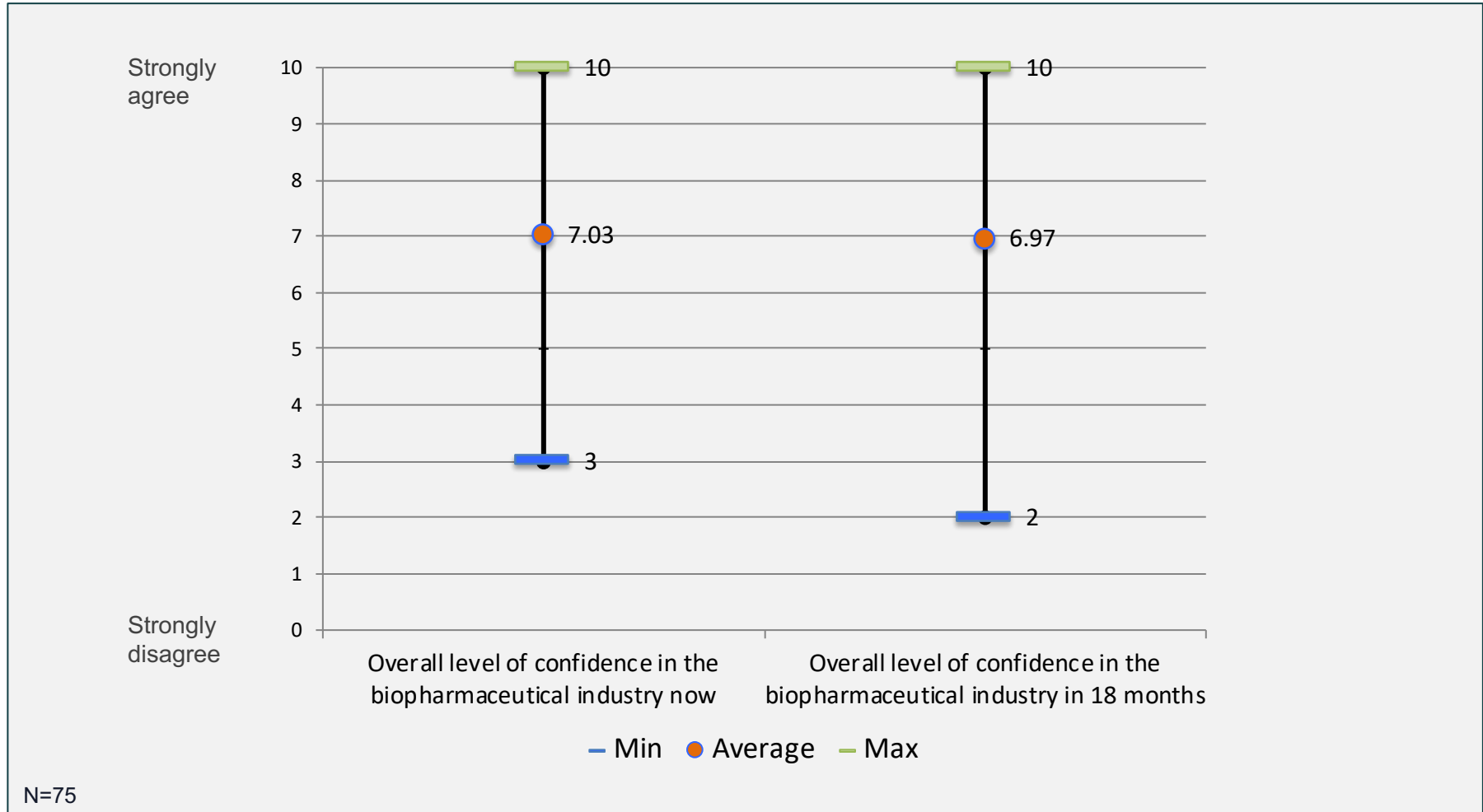
Please indicate your company's therapeutic focus. Select all that apply.



N=79

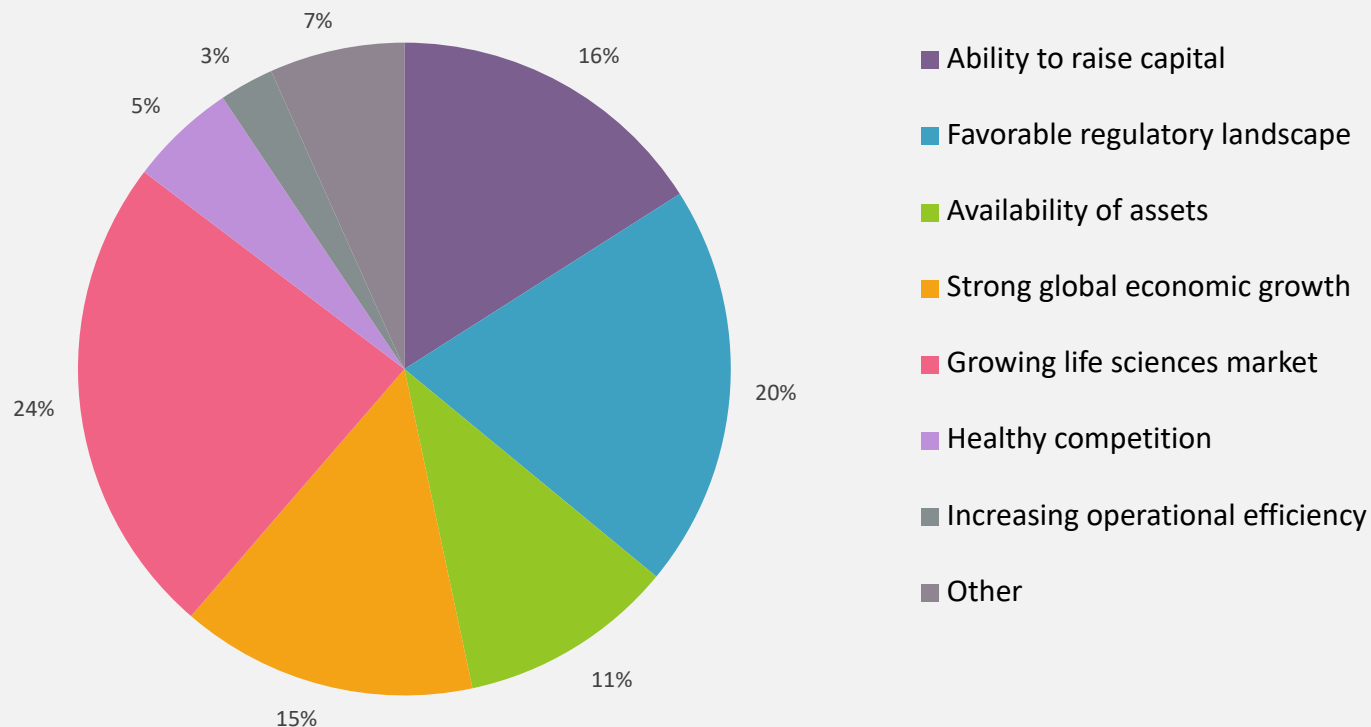
Confidence Levels

Respondents are equally as confident in the biopharmaceutical industry today than they are in the next 18 months



Confidence in biopharmaceutical industry is driven by a *growing life sciences market* and a *favorable regulatory landscape*

What is the driving your overall confidence in the biopharmaceutical industry in the next 18 months?

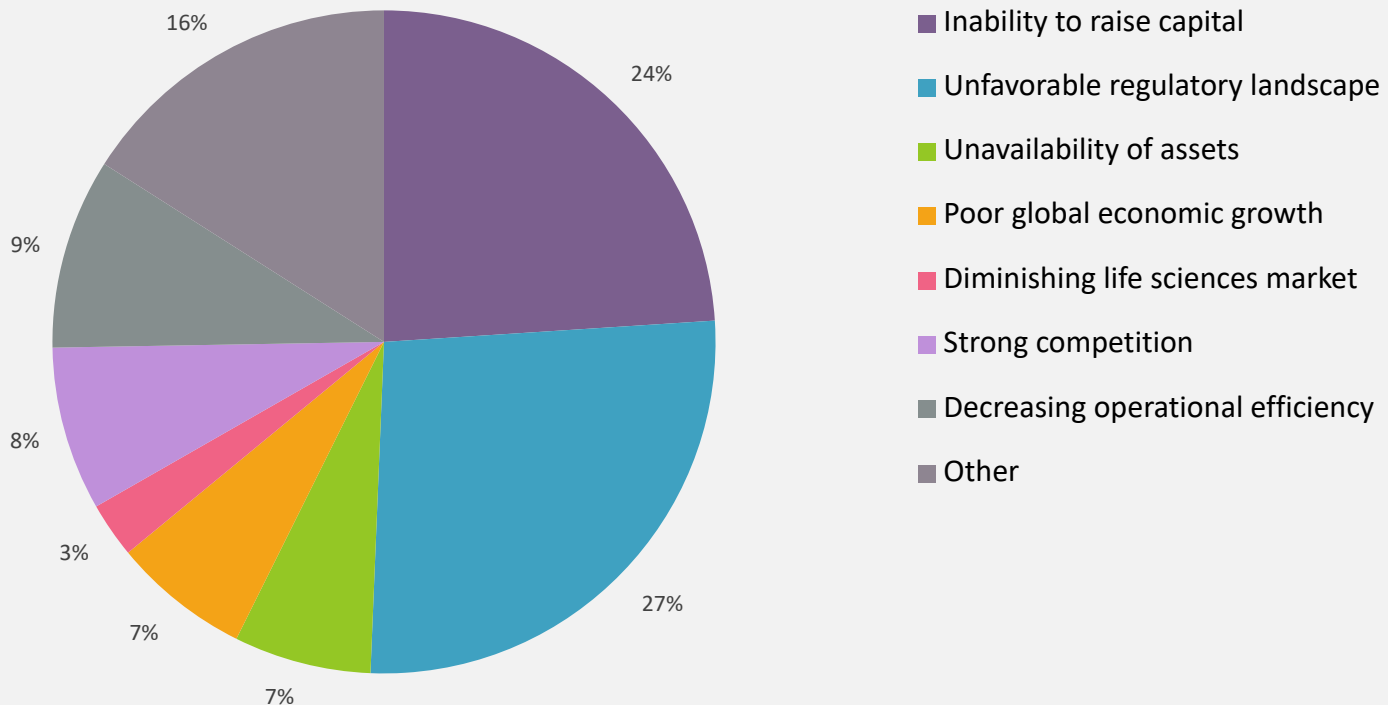


N=75

Other include: new cellular products, company data, cutting edge science, lack of efficiency

Top risks include *unfavorable regulatory landscape* (27%) and *inability to raise capital* (24%)

What is the largest risk to the biopharmaceutical industry in the next 18 months?



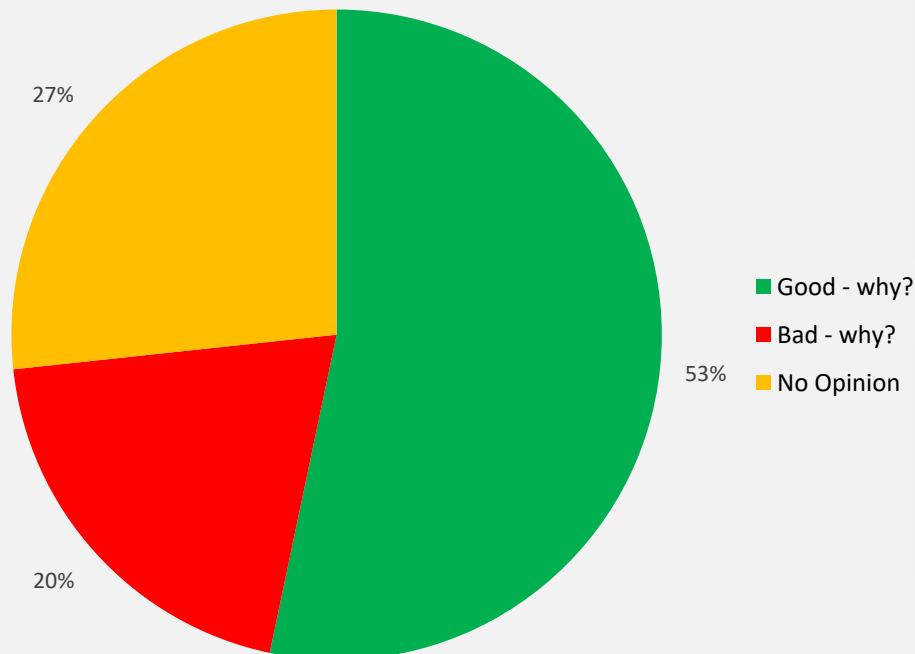
N=75

Other include: pricing (3x), regulatory, payor landscape.

Property of Kineticos © Copyright 2018

Majority of respondents indicate the Immuno-Oncology is good for the biopharmaceutical industry

Do you think that attention to Immuno-Oncology is good or bad for the biopharmaceutical industry?



N=75

Top cited reasons why attention on I/O is good for the industry

"Innovation"

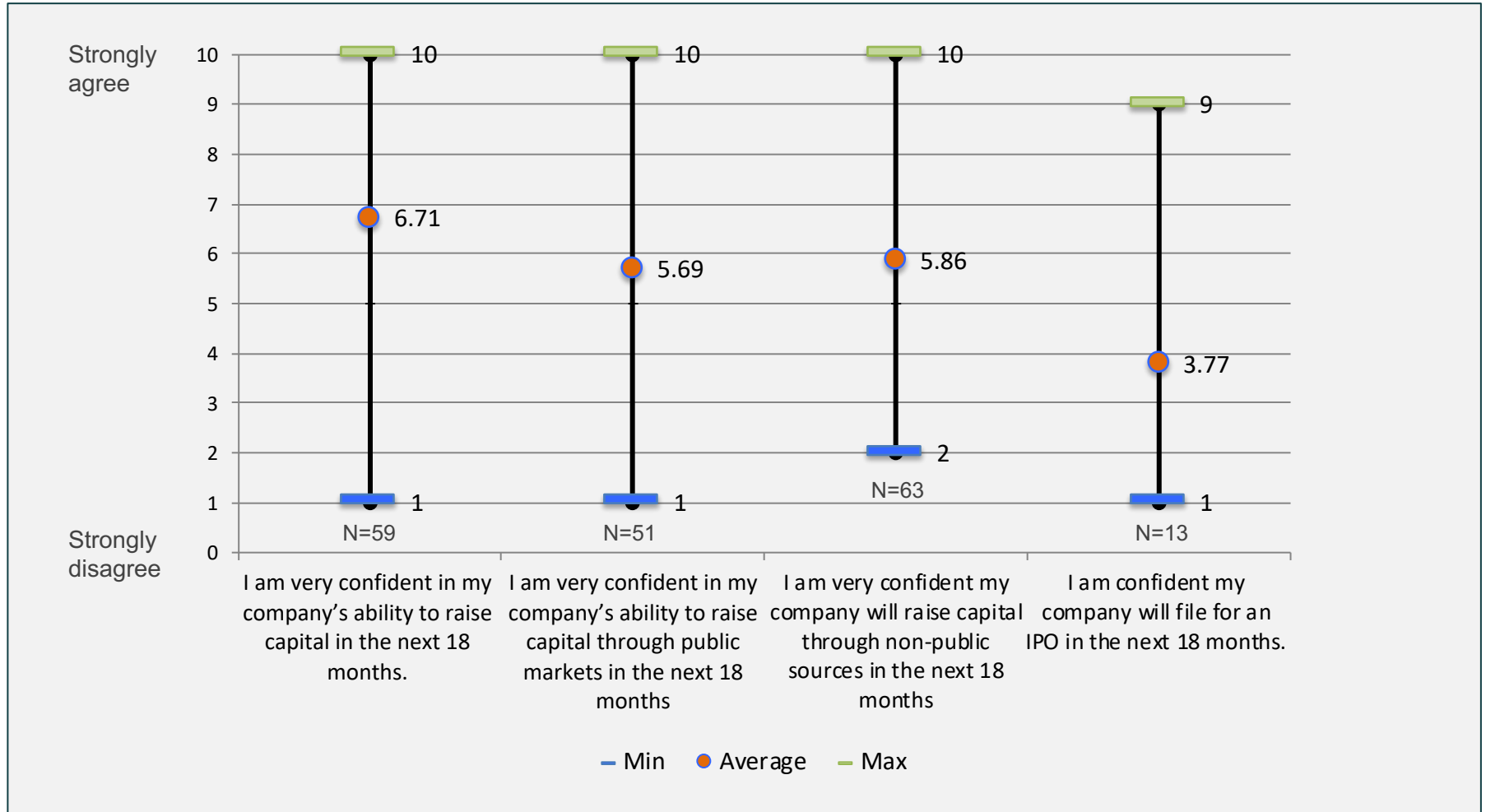
"Large unmet need"

"Improvement of patient outcomes"

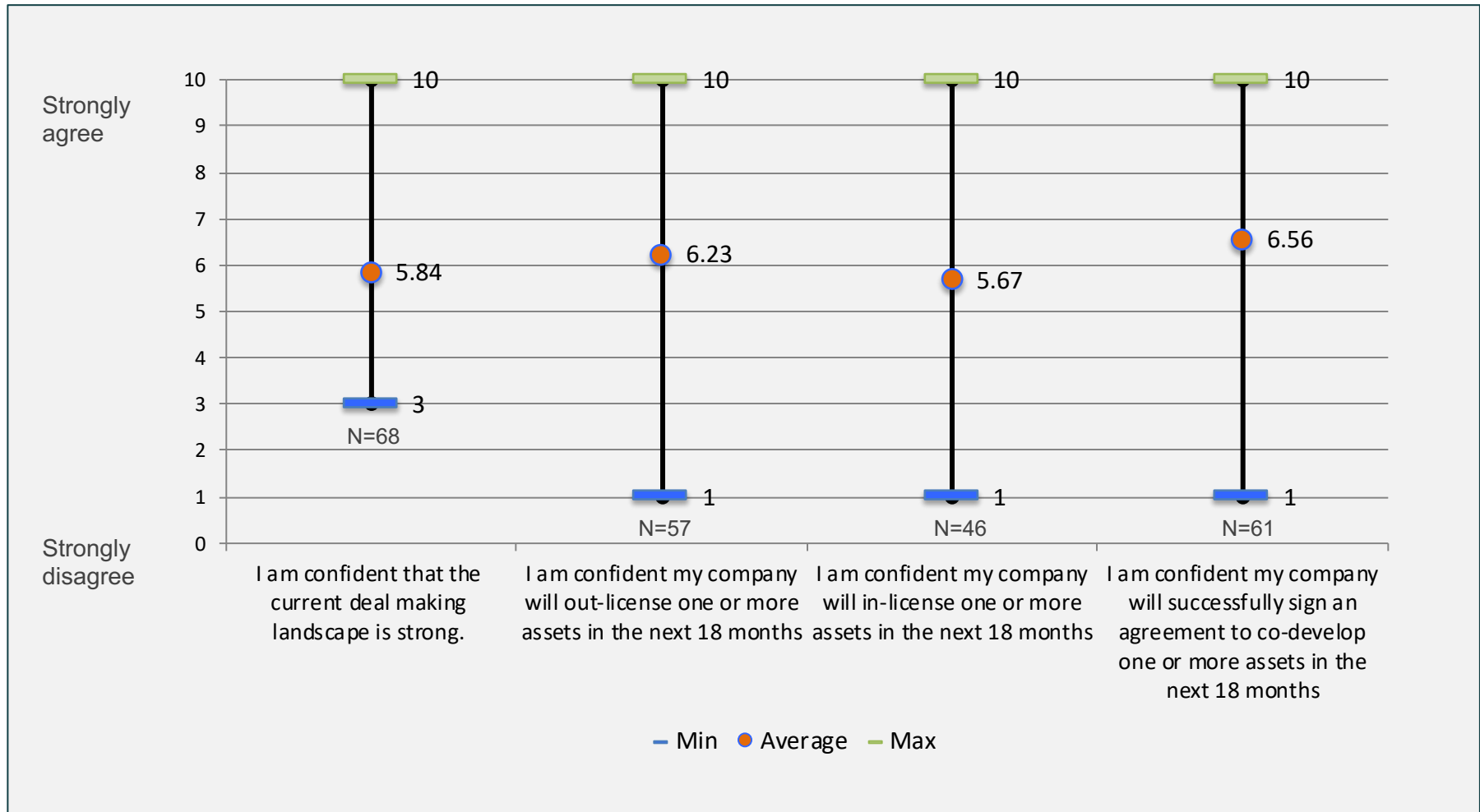
Top cited reason why attention on I/O is bad for the industry

"Over emphasis on one therapeutic area at the expense of other needs"

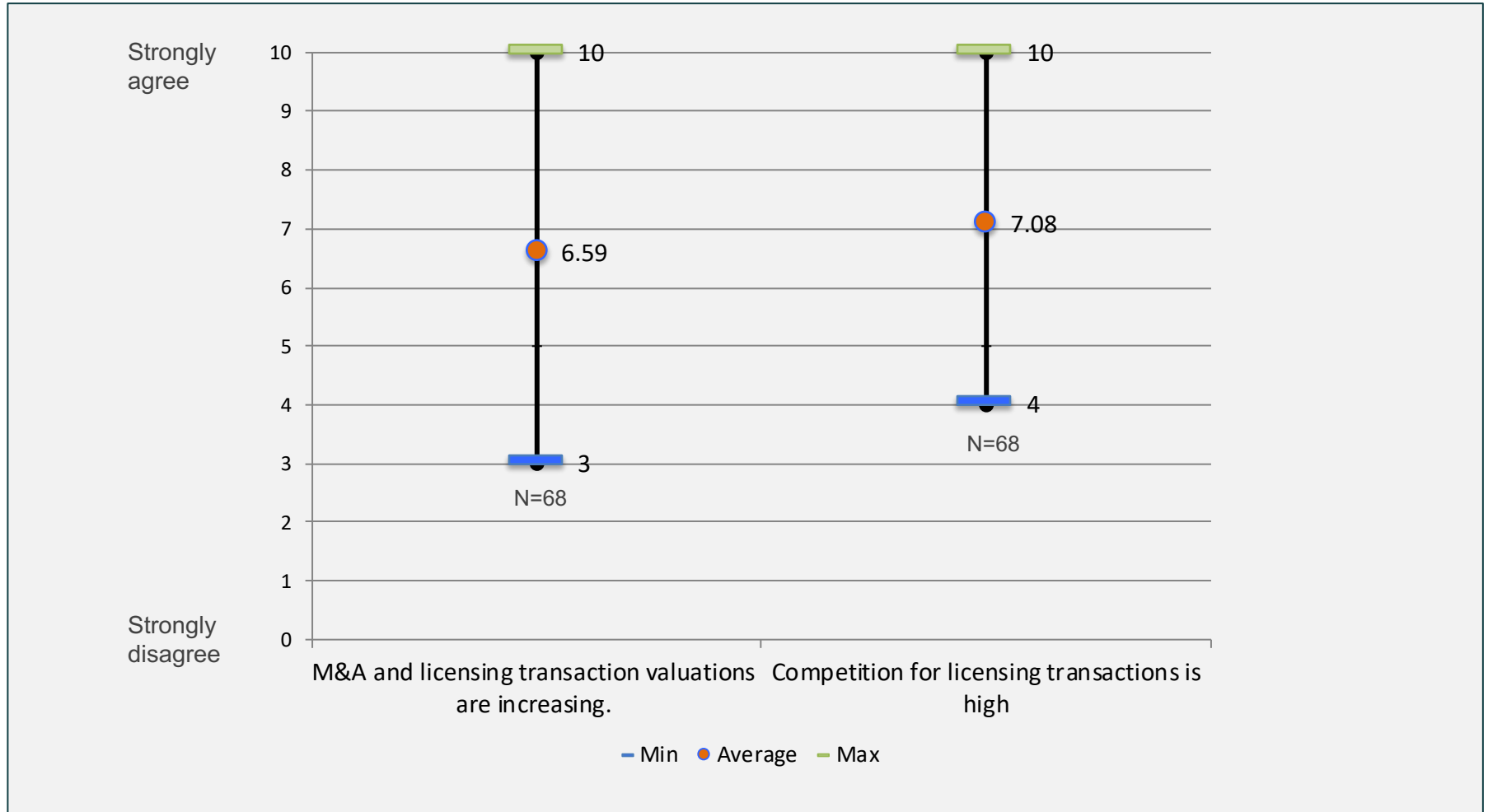
Confidence levels related to Capital Markets are moderate



Confidence in the *deal landscape* is slightly stronger than confidence in *capital markets*



Valuations are on the rise and competitive intensity is relatively high



Kineticos

LIFE SCIENCES CONSULTING

Success

Solution

Business Strategy

- Innovation
- Branding
- Solution
- Marketing
- Analysis
- Ideas
- Success
- Management

Thank you

nathan.finger@kineticos.com

- Innovation
- Branding
- Solution
- Marketing
- Analysis
- Ideas
- Success
- Management

SOCIAL NETWORK