

# Preferred providers

Industry Standard Research takes a wide look at preferred provider arrangements with research, software, and manufacturing organizations by presenting data on preferred provider use, quantity, and selection drivers.

# Preferred provider use

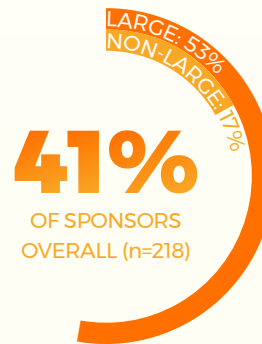
## Phase I CRO outsourcing



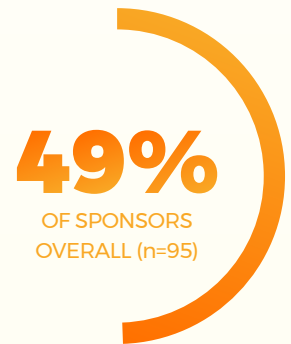
## Phase II/III CRO outsourcing



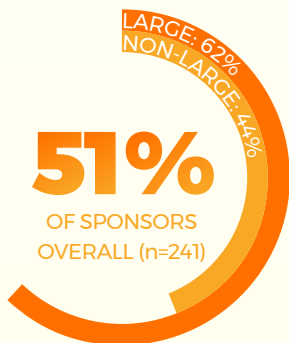
## Phase IV CRO outsourcing



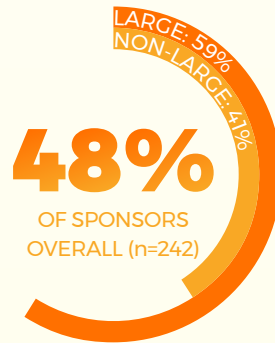
## eTMF software outsourcing



## Small molecule (SM) API CMO outsourcing



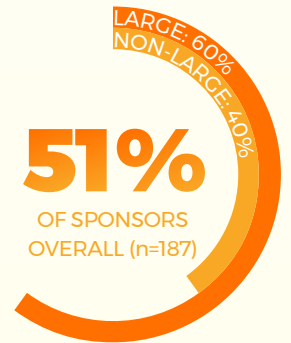
## SM drug product CMO outsourcing



## Biologic API CMO outsourcing



## Biologic drug product CMO outsourcing

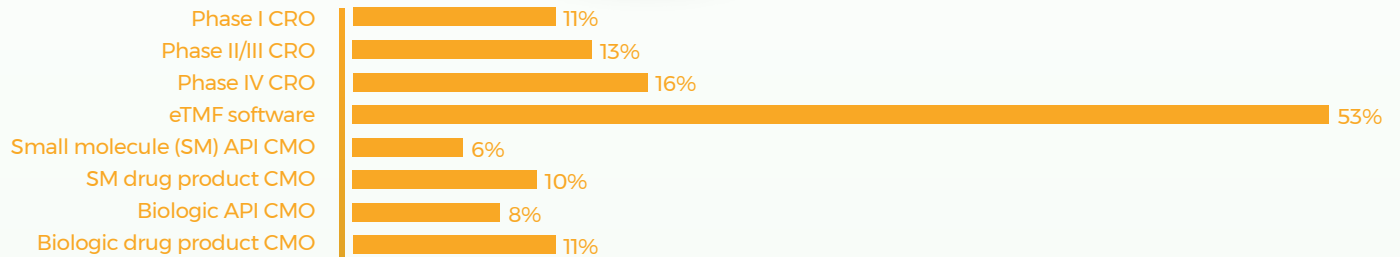


About half of sponsors use preferred providers for outsourced clinical, manufacturing, or software work. However, there are differences in usage rates between large and non-large sponsors; large sponsors are more likely to use preferred providers.

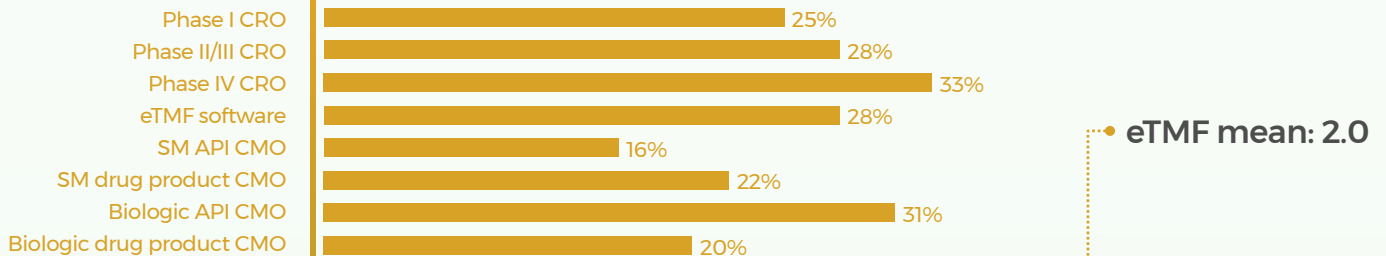
# Number of preferred providers

Number of preferred providers

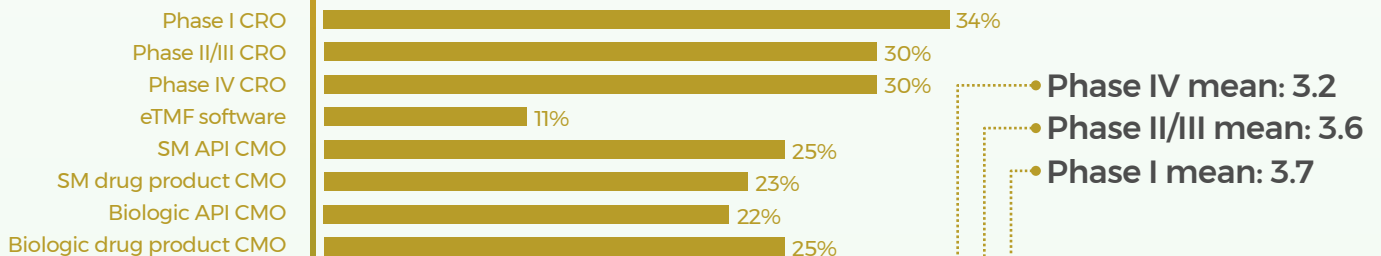
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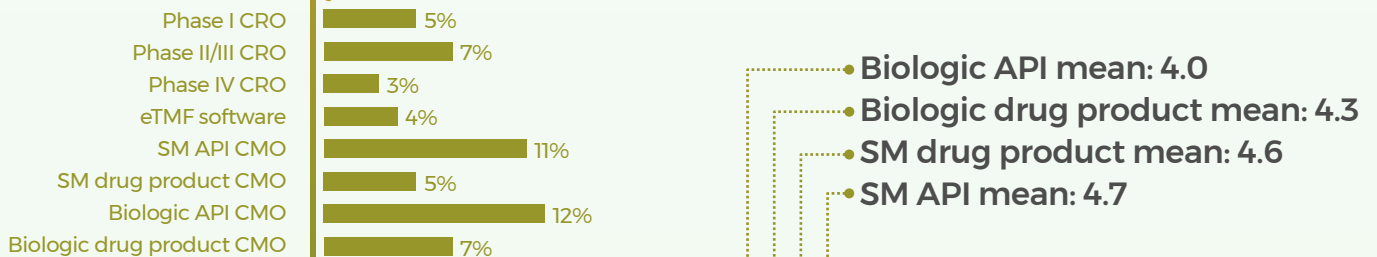
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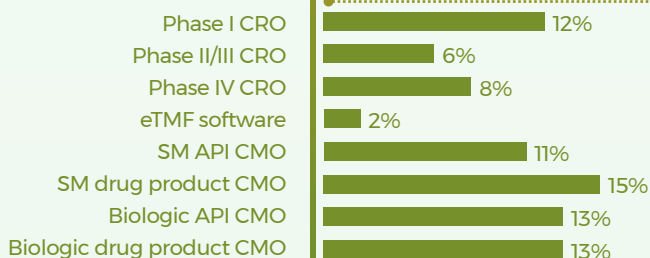
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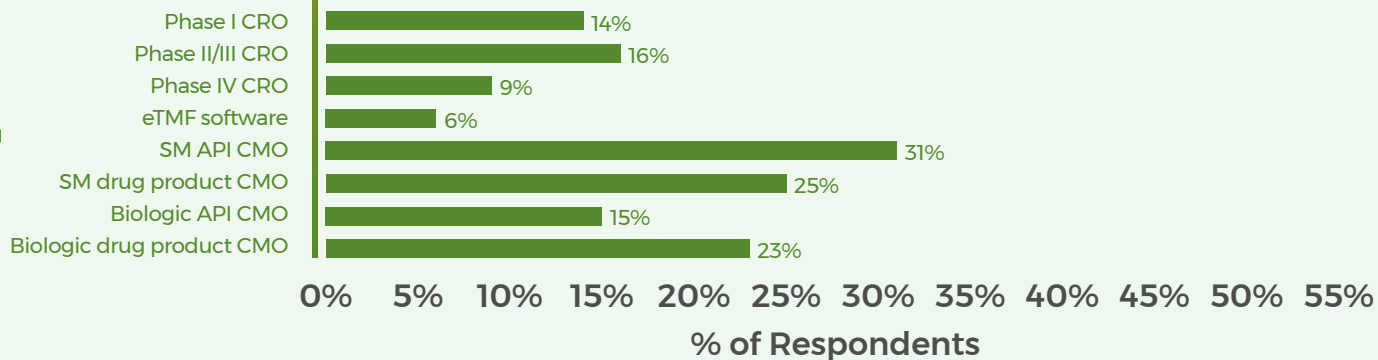
4



5



6+



Respondents indicated their companies tend to have more preferred providers for manufacturing work, and fewer for outsourced technologies. About half of sponsors that have preferred providers for technology only have one provider on their list.

## Preferred provider selection drivers

Expectations for data quality



Global footprint\*



Low cost



Expectations for  
data quality



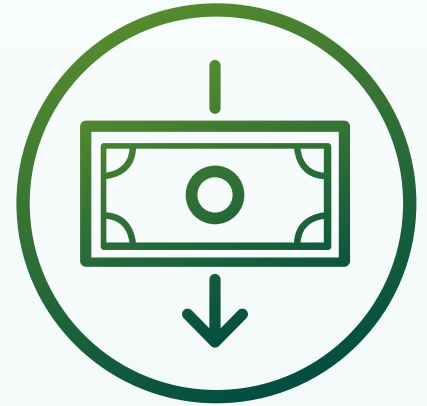
Top 5 driver for  
**30%**  
of CRO respondents

Global  
footprint\*



Top 5 driver for  
**34%**  
of CRO respondents

Low  
cost



Top 5 driver for  
**28%**  
of CRO respondents

Metrics for meeting  
overall project timelines



Top 5 driver for  
**17%**  
of CRO respondents

Operational  
excellence



Top 5 driver for  
**47%**  
of CRO respondents

Prior positive experience  
with service provider



Top 5 driver for  
**36%**  
of CRO respondents

Project manager  
quality



Top 5 driver for  
**28%**  
of CRO respondents

Provider  
responsiveness



Top 5 driver for  
**22%**  
of CRO respondents

Therapeutic  
expertise



Top 5 driver for  
**37%**  
of CRO respondents

\*Phase I respondents indicating the importance of Location of Phase I units in different global locations were coded into the *Global footprint* table.

The most important attribute for sponsors to include a CRO on their preferred provider list across all research phases is *Operational excellence*. However, each attribute was indicated as a Top 5 driver for at least 20% of respondents in one or more phases.