

THE PHASE IV ENVIRONMENT

A SURVEY OF 230 DECISION-MAKERS

“

IN THE PAST 18 MONTHS, HAVE YOU WORKED WITH A PHASE IV SERVICE PROVIDER THAT HAS BEEN GOING THROUGH A MERGER OR RECENTLY COMPLETE A MERGER?

”

MERGERS

YES 33%

NO 67%

EXTREMELY DISRUPTIVE 0%

VERY DISRUPTIVE 1%

SOMEWHAT DISRUPTIVE 39%

NOT VERY DISRUPTIVE 37%

NOT AT ALL DISRUPTIVE 22%

“

HOW DISRUPTIVE HAS/HAVE THE MERGER(S) BEEN FOR YOUR OUTSOURCED PHASE IV WORK?

”

“

IN YOUR EXPERIENCE, HOW DO YOU FEEL PHASE IV SERVICE PROVIDER PERFORMANCE HAS CHANGED OVER THE PAST FEW YEARS

”

PERFORMANCE CHANGE

GREATLY IMPROVED 4%

SOMEWHAT IMPROVED 28%

STAYED ABOUT THE SAME 54%

SOMEWHAT DECLINED 13%

GREATLY DECLINED 1%

POTENTIAL CHANGE IN CRO USE

“

USING THE SCENARIOS LISTED BELOW, PLEASE INDICATE HOW LIKELY YOUR ORGANIZATION WOULD BE TO CHANGE THE MIX OF CROs BASED ON THE SCENARIO. WE DEFINE “CHANGE THE MIX OF CROs” NOT AS WHETHER YOUR OUTSOURCING WOULD INCREASE OR DECREASE, BUT RATHER HOW YOUR OUTSOURCED WORK MIGHT CHANGE ACROSS OR BETWEEN CROs.

”

IMPROVED CLINICAL TECHNOLOGY INTEGRATION

15%

44%

27%

14%

PROVIDER HAS SUPERIOR HEOR OR REAL-WORLD DATA/REAL-WORLD EVIDENCE EXPERTISE

22%

37%

24%

17%

ADVANCEMENTS IN BIOMARKER TECHNOLOGY

13%

37%

27%

23%

VERY LIKELY TO CHANGE

SOMEWHAT LIKELY TO CHANGE

SLIGHTLY LIKELY TO CHANGE

NOT AT ALL LIKELY TO CHANGE