

# Outsourced Proportion of Phase II/III Spend

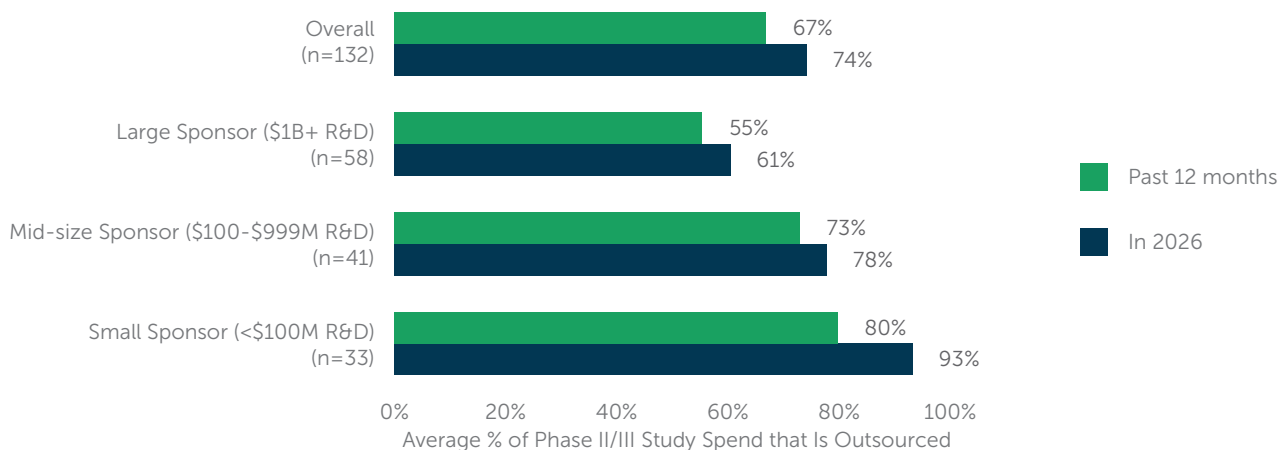


ISR recently ran a survey to assess dynamics in the Phase II/III clinical development space. Survey respondents reported that, on average, two-thirds of their company’s spend on Phase II/III studies over the past year was outsourced. According to survey participants, large sponsors outsourced roughly half of their Phase II/III spend (55%), while mid-size and small sponsors outsourced 73% and 80% of their spend, respectively.

While respondents across all sponsor sizes anticipate that a higher proportion of Phase II/III spending will be outsourced by 2026, those at small companies expect the largest increase (13 percentage points on average). Approximately half of this year’s survey participants who expect an increase in outsourcing cite Pipeline success/more compounds to study (56%), More complex or large studies (54%), and Insufficient internal capacity (47%) as reasons for their predicted increase in outsourcing.

**“Approximately, what percent of your company’s spend on Phase II/III studies has been outsourced over the last 12 months?”**

**“Approximately, what percent of your company’s spend on Phase II/III studies would you estimate will be outsourced in 2026?”**



**“What do you anticipate will cause this increase in your company’s Phase II/III outsourcing proportion between now and 2026? Please select all that apply.” (n=59, only shown to respondents anticipating outsourcing proportion increase)**

