THE PHASE I ENVIRONMENT

A SURVEY OF 305 DECISION-MAKERS

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

MERGERS

YES 25%

NO 75%

EXTREMELY DISRUPTIVE 1%

VERY DISRUPTIVE 4%

SOMEWHAT DISRUPTIVE 26%

NOT VERY D<mark>isruptive 44%</mark>

NOT AT ALL DISRUPTIVE 25%

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

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

PERFORMANCE CHANGE

SOMEWHAT IMPROVED 28%

GREATLY IMPROVED 3%

STAYED AROUT THE SAME 56%

SOMEWHAT DECLINED 12%

GREATLY DECLINED 1%

POTENTIAL CHANGE IN CRO USE

4,4

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.

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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% 27% 23%

VERY LIKELY TO CHANGE SOMEWHAT LIKELY TO CHANGE SLIGHTLY LIKELY TO CHANGE NOT AT ALL LIKELY TO CHANGE

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