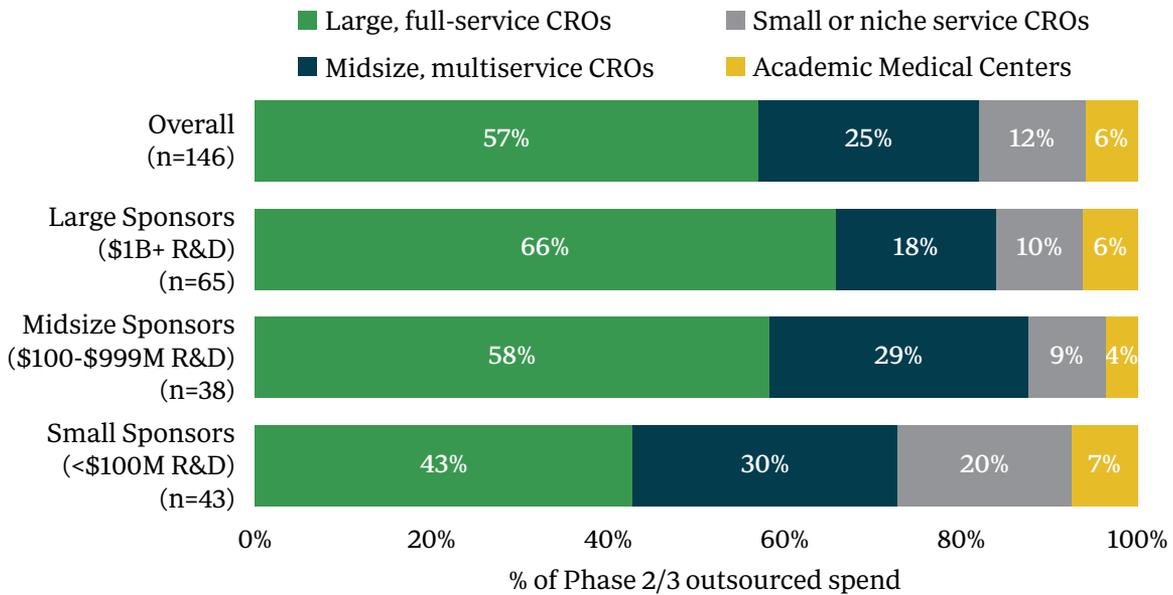


# Phase 2/3 Outsourced Spend By Provider Type



ISR asked respondents responsible for outsourcing Phase 2/3 drug development how they allocate their outsourcing budget towards CROs of various sizes and academic medical centers. As expected, large, full-service CROs receive the largest amount, accounting for 57% of outsourced spend overall. In a separate question, respondents were asked to select benefits of each provider type. Respondents selected an average of eight associated benefits for large CROs, about six for midsize and small CROs, and about four for Academic Medical Centers.

*“Please estimate the percent of your company’s Phase 2/3 outsourcing spend with each of the following types of service providers. Your best estimate is fine. Columns must total 100%.”*



*“What unique benefits, if any, do you associate with using [this type of service provider] for Phase 2/3 services? Please select all that apply.” (n=146)*

### Large, full-service CROs



~8 associated benefits, including *global footprint*

### Midsize, multiservice CROs



~6 associated benefits, including *quality*

### Small or niche service CROs



~6 associated benefits, including *specialized focus*

### Academic Medical Centers



~4 associated benefits, including *KOL access*