

# THE PHASE I ENVIRONMENT

A SURVEY OF 305 DECISION-MAKERS



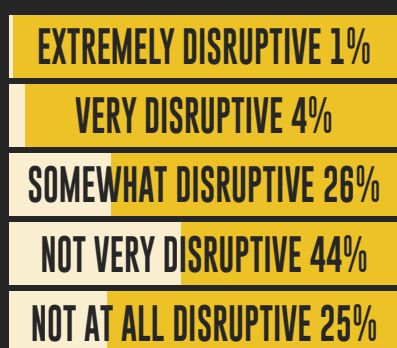
IN THE PAST 18 MONTHS, HAVE YOU WORKED WITH A PHASE I SERVICE PROVIDER THAT HAS BEEN GOING THROUGH A MERGER OR RECENTLY COMPLETED A MERGER?



## MERGERS



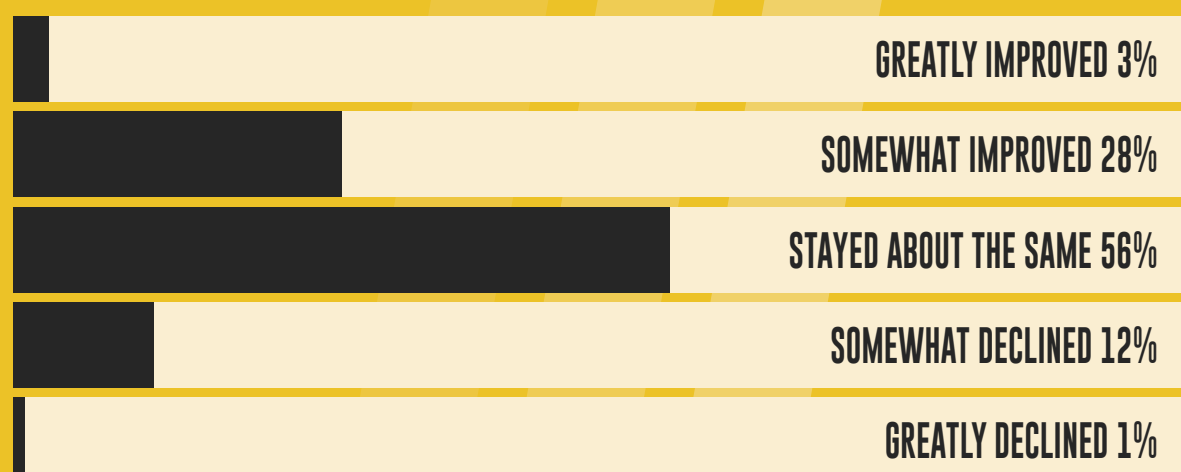
HOW DISRUPTIVE HAS/HAVE THE MERGER(S) BEEN FOR YOUR OUTSOURCED PHASE I WORK?



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



## PERFORMANCE CHANGE



## 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.



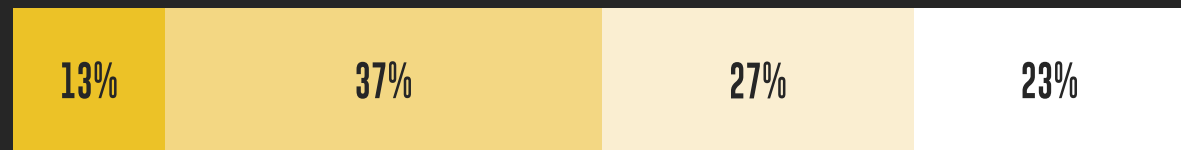
### IMPROVED CLINICAL TECHNOLOGY INTEGRATION



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



### ADVANCEMENTS IN BIOMARKER TECHNOLOGY



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