

# THE PHASE II/III ENVIRONMENT

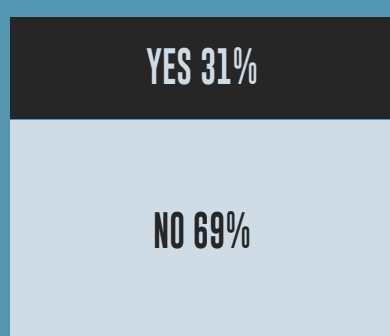
A SURVEY OF 301 DECISION-MAKERS

“

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

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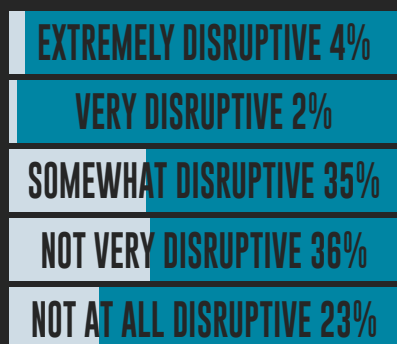
## MERGERS



“

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

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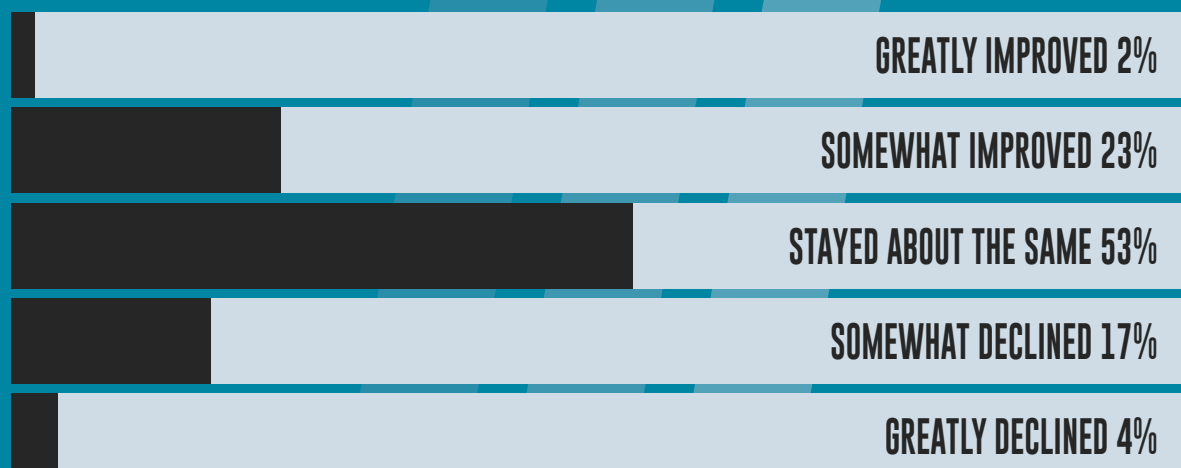


“

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

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## 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.

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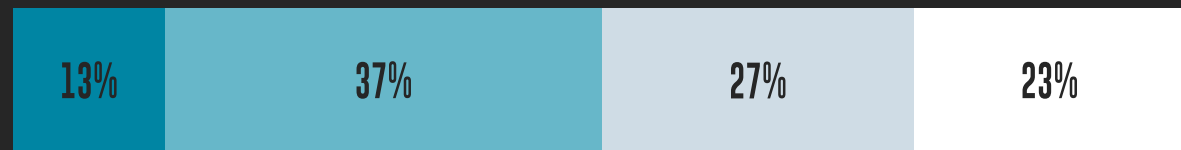
### IMPROVED CLINICAL TECHNOLOGY INTEGRATION



### 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