

THE PHASE IV ENVIRONMENT

A SURVEY OF 230 DECISION-MAKERS



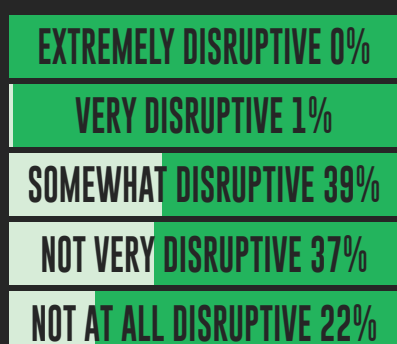
IN THE PAST 18 MONTHS, HAVE YOU WORKED WITH A PHASE IV SERVICE PROVIDER THAT HAS BEEN GOING THROUGH A MERGER OR RECENTLY COMPLETE A MERGER?



MERGERS



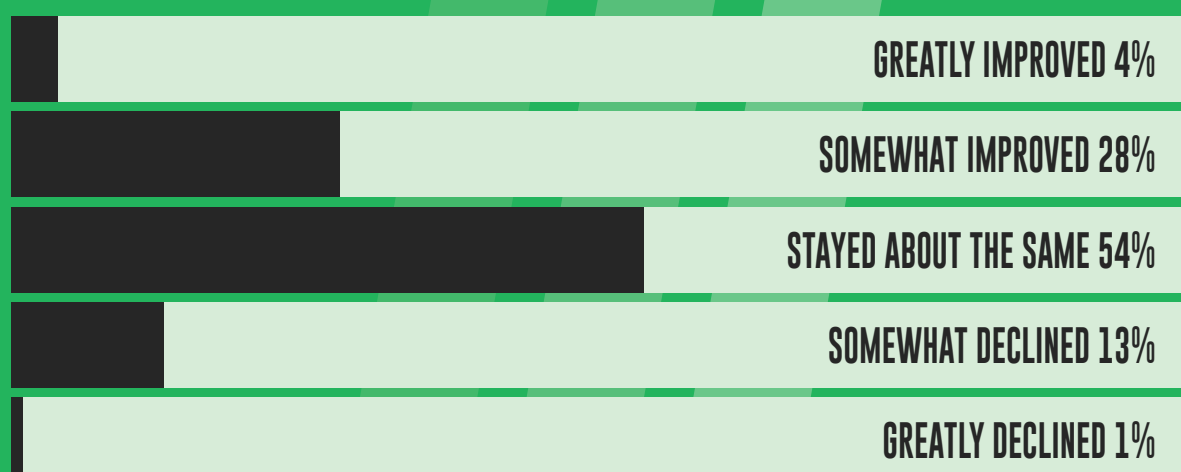
HOW DISRUPTIVE HAS/HAVE THE MERGER(S) BEEN FOR YOUR OUTSOURCED PHASE IV WORK?



IN YOUR EXPERIENCE, HOW DO YOU FEEL PHASE IV 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