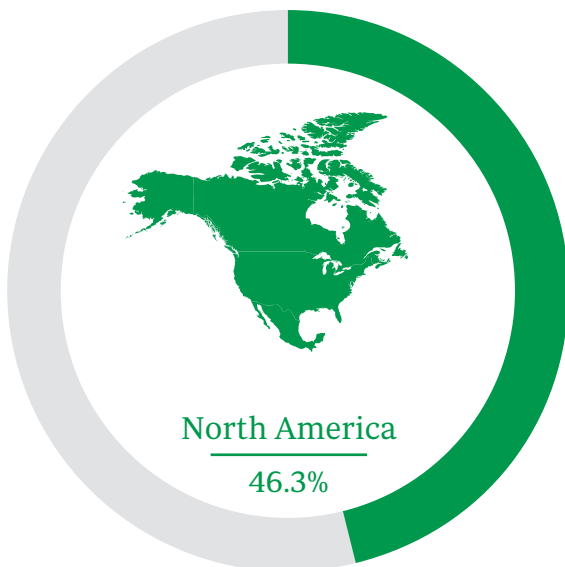




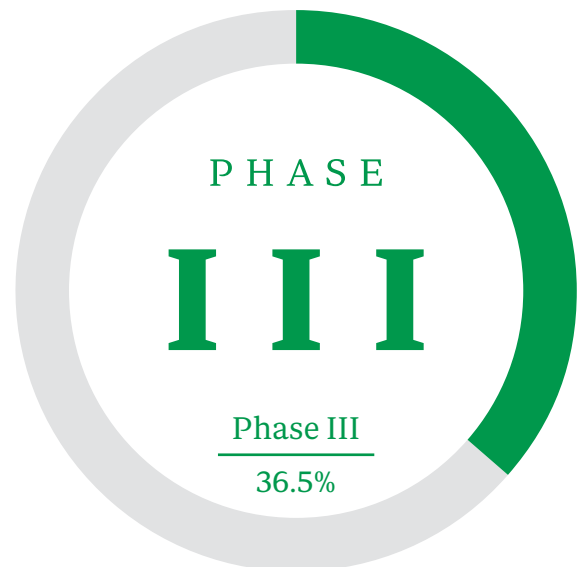
# What are the largest slices of the 2018 CRO Market?

2017 was another strong year for CRO growth, with all major/public service providers experiencing year-over-year revenue gains. The largest component of CRO market revenue by geography, development, and service line is highlighted below.

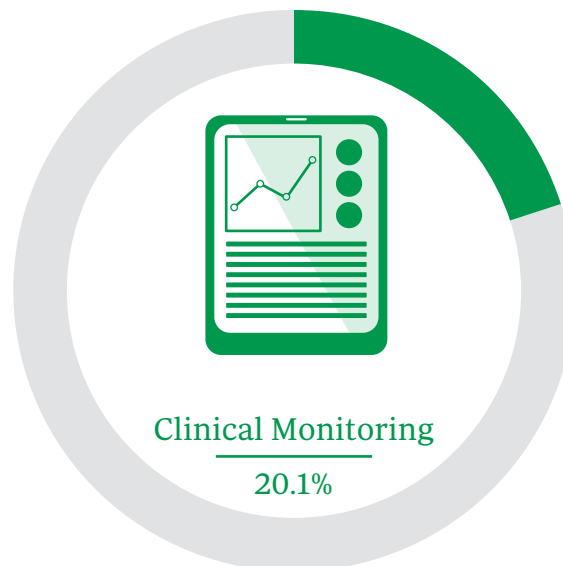
## GEOGRAPHIC DISTRIBUTION



## DEVELOPMENT PHASE DISTRIBUTION



## SERVICE LINE DISTRIBUTION



### OTHER SERVICES INCLUDE:

- ▶ Investigator Payments
- ▶ Laboratory
- ▶ Data Management
- ▶ Project Management
- ▶ Patient and Site Management
- ▶ Technology
- ▶ Biostatistics
- ▶ Imaging
- ▶ Medical Writing
- ▶ Regulatory
- ▶ Quality Assurance