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With clinical trials being run all over the world, outsourcing is a near-inevitability. Only 3% of our survey respondents said they didn't outsource any part of their trial planning and operations. Equally unsurprising, trial monitoring is the most frequently outsourced step; 83% of our survey-takers outsourced this step. 76% of respondents outsourced data management and patient enrollment and site selection weren't far behind, with 58% of respondents outsourcing each of these steps.

The activities that remain in house were more evenly distributed besides managing investigator brochures; 80% of respondents did that in house. Other tasks including electronic patient reported outcomes and signal detection were only managed in house for 33% of groups.

For groups that are outsourcing work internationally, 83% found it challenging to manage global project teams across cultures. China and Russia topped the list of countries on which firms are focusing. The other two BRIC countries—Brazil and India—are only seeing attention from 17% of our respondents.

In many ways it makes sense to outsource operations abroad. Respondents reported not having enough internal staff to dedicate to those countries and the cost-savings and local expertise realized when working with teams on the ground.

But communication issues with CROs is the top complaints for companies—51% of survey takers had concerns about that—and the list of challenges was diverse. Nearly a third of respondents had had challenges in every area we asked about: delivery of results in a timely manner, sticking to the study budget, technology issues, and more. While outsourcing is needed, developing strong relationships is still an area of concern for most sponsors.

That may be why 42% of the survey-takers rely on historic site partners. Just at half—51%—outsource site selection, leaving only 7% of respondents reporting that they use a site selection software that might introduce them to newer partners or sites around the world.

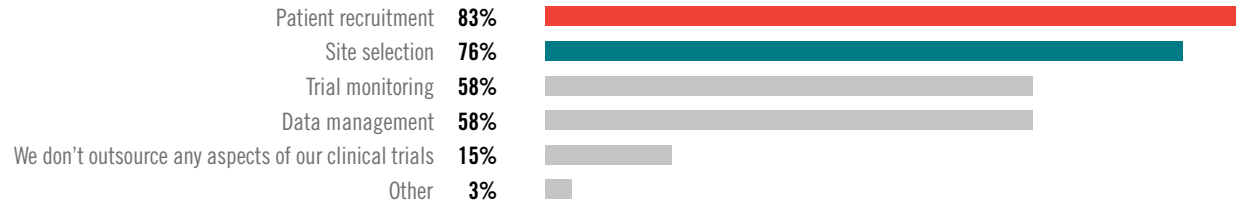
Outsourcing is certainly here to stay, but it's clear that sponsors and sites are still working out the kinks. Smoothing the ways trials are outsourced still holds much promise and room for growth in the industry.

(N=59)

What phase is your trial in?



Which aspects of your clinical trials (planning and operations) do you outsource?



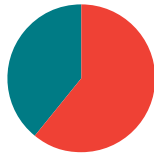
Answers for "Other:" Clinical and ePRO data collection; Full service; Labs electronic data capture system; Medical writing; Pharmacovigilance; Statistics; Stats, PVG

Which aspect(s) of clinical trials are you keeping in house?



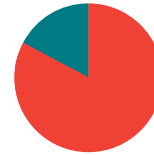
Answers for "Other:" Biostatistics; Copies of all administrative documents for GCP compliance; Data analysis; Medical monitoring, oversight; Medical writing; N/A; None; Patient recruitment; Project management; Protocol creation, stats; Protocol design; Protocols; Site selection; Statistics; We oversight the work of CRO

Do you outsource the management of your clinical trials?



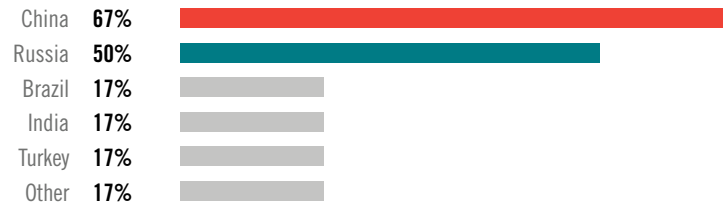
Yes **61%**
No **39%**

In your outsourcing and management of clinical trials, on which regions are you focusing?



Local regions **83%**
Emerging markets **17%**

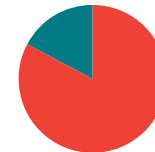
On which emerging markets are you focusing?



Answers for "Other:" APAC

Have you encountered any challenges managing global project teams across cultures?

Yes **83%**
No **17%**



How are you managing global project teams across various time zones?

We convene conference calls at the most convenient time possible **100%**
We rely on email and shared documents **67%**
We travel to meet in person periodically **33%**
My teams are all in the same time zone **0%**
Other **0%**



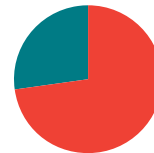
Why is your organization outsourcing to emerging regions?

Answers for "Other:" Cost effective



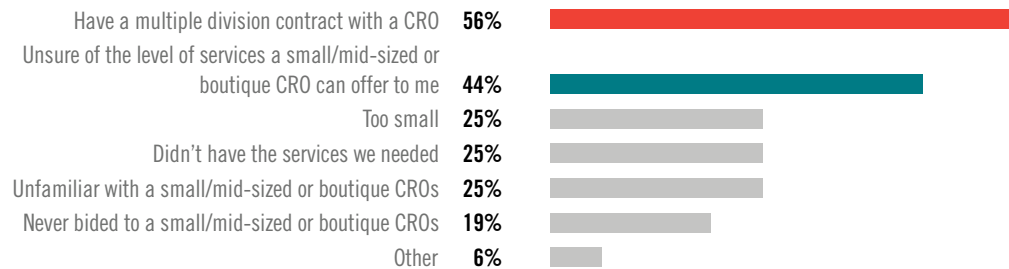
Have you ever considered using a small/mid-sized or boutique CRO?

Yes **73%**
No **27%**



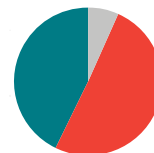
Why haven't you used a small/mid-sized or boutique CRO?

Answers for "Other:" Then it is too many vendors to manage, plus data integration becomes a challenge, specially re-conciliation becomes a time consuming process

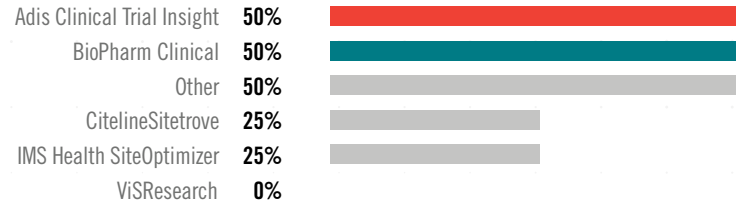


Are you using any site comparison software?

Yes **7%**
No, we outsource site selection **51%**
No, we have historic partners and we continue to work with those **42%**

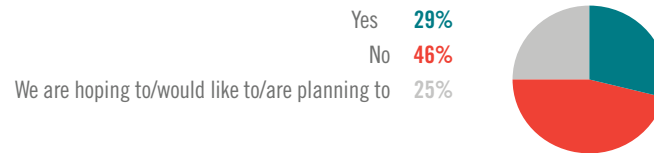


Which products are you using?



Answers for "Other:" In-house built; In-house developed product

Is your company moving beyond outsourcing to Strategic Alliances?

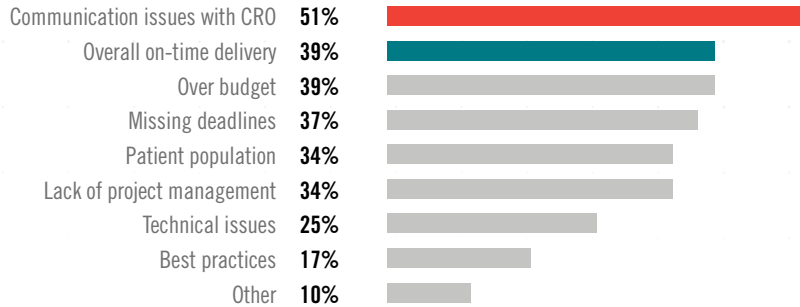


What are the challenges in their implementation?



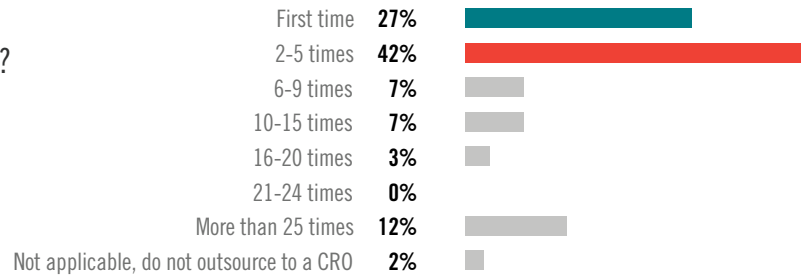
Answers for "Other:" Pace of execution; SOPs

Overall, what are your biggest challenges with outsourcing your clinical trials?

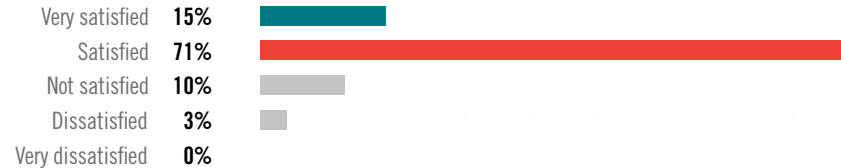


Answers for "Other:" Lack of eTMF CTMS; Quality; Resourcing; Sound Reg Affairs consulting; Trust; Turnover of CRO personnel

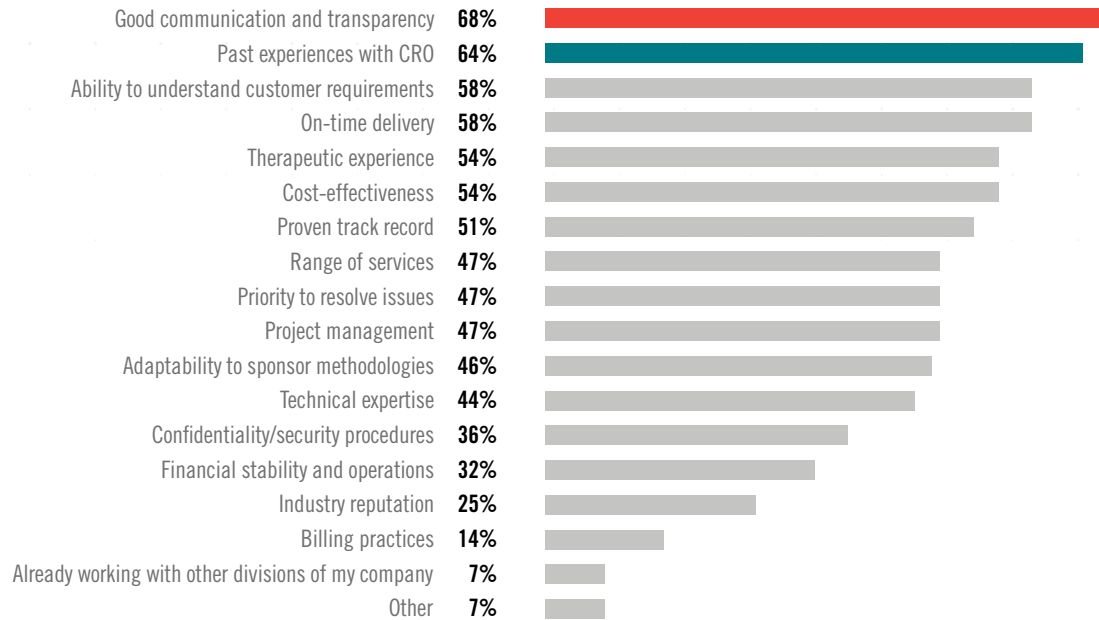
Thinking about the CRO you've been most pleased with, how many times have you outsourced to this same CRO?



Overall, what is your satisfaction with this CRO?

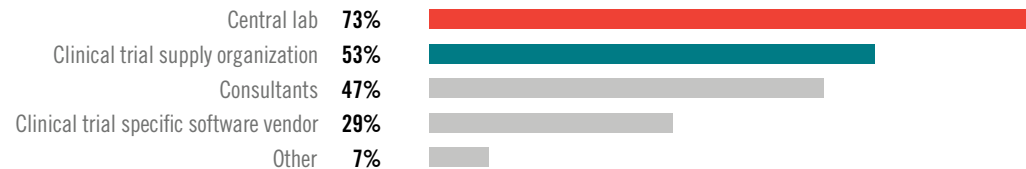


What factors are most important when choosing a CRO?



Answers for "Other:" Global capabilities; Global footprint; Global reach; Quality of the work

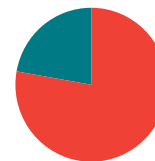
What type of vendors are you outsourcing to outside of a CRO?



Answers for "Other:" Evaluation of radiology; Patient recruitment; Recruitment specialists; Site management organizations

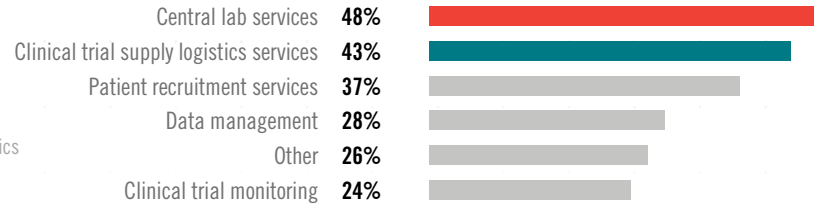
Do you allow your CRO partner to subcontract with third party vendors to meet the needs of your agreement?

Yes **78%**
No **22%**



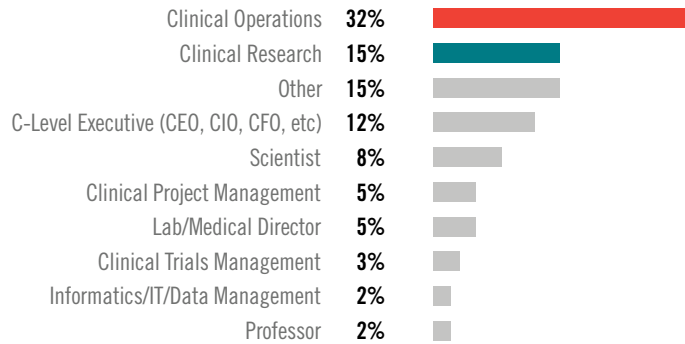
What activities does your CRO subcontract?

Answers for "Other:" Biostats, Reg Affairs consulting; Depends; EudraVigilance; Hueristics and Algorithms; IXR; None; Other countries like Turkey; Payments, logistics; Radiology evaluation; Specialist services; Specialty services; Reading centers; EKG adjudication

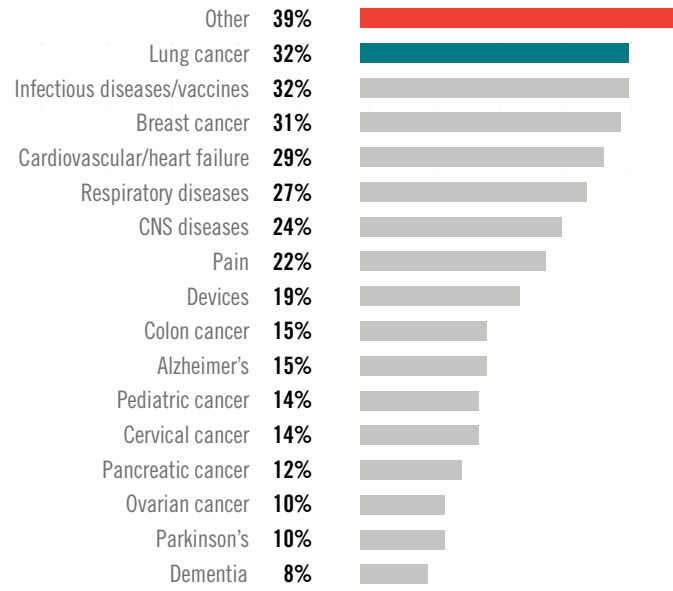


What best describes your job function?

Answers for "Other:" Advisor; Clinical Procurement; Contracts & Outsourcing; Executive Management; Quality; Quality Assurance; Regulatory Affairs; Senior Director Patient Advocacy



In which research areas are your clinical trials?



Answers for "Other:" CIDP/GBS/SMS; CRPC; Diabetes; CKD; Hypertension; Gastrointestinal Disease; Genetic/orphan; Hematological Malignancies; Hematology; Immunology; Interventional Radiology and Interventional Cardiology; MS; Pharmacogenomics; Prostate cancer; Rare disease; Renal; Hematology; Rheumatology; Surgery; Transplant; Nephrology; Urology; Ultra rare disease

How many employees are in your organization?



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