About our respondents

As part of our Spotlight on future trends in outsourcing, we carried out a survey, which was completed by a number of CRO, Pharma & Biotech leaders within the industry, on various aspects on outsourcing. The results of the survey can be seen in this infographic.

Future trends in outsourcing

The future of bioanalytical outsourcing

**Pharma vs CRO**

Who makes the final decision on outsourcing?

Top three reasons for change in outsourcing:

Key elements for successful outsourced work

Most important

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Pharma</th>
<th>CRO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>Size</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Culture</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Equipment</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Other: history of regulatory compliance, quality &amp; strategic relationship</td>
<td>3%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Percentage of work outsourced**

**Barriers faced, which would prevent Pharma from outsourcing work again?**

"Unresponsiveness and imprecise data"

"Regulatory compliance and scientific expertise"

"Staff not understanding regulations or doing work according to protocols"

"Timelines that could not be met"

**How are CROs coping with the change in sample number?**

"Improve efficiency & hire more staff"

"Introduction of automation"

"Constantly changing priorities to meet customer demand"

"Investment (instrumentation, automation, staff)"

**Has the number of samples received by CROs for analysis changed in the last 2 years?**

Decreased: 9%

Increased: 57%

Remained similar: 33%

**What are the top three reasons for change in outsourcing?**

1) Reductions in in-house capabilities

2) Increasing complexity of molecules

3) Time pressures

**Has there a rightful demand for Pharma to share all aspects of clinical information of a particular project to CRO’s?**

Yes – completely: 16%

No – only information relating to outsourced work: 19%

Yes – to some degree: 63%

**About our respondents**

**Who makes the final decision on outsourcing?**

Procurement: 22%

Scientific lead: 15%

Project manager: 26%

**Top three reasons for change in outsourcing: 1) Reductions in in-house capabilities 2) Increasing complexity of molecules 3) Time pressures**

**Criteria**

In what ways can CROs and Pharma work together?

Better communication

Shared training/exchange of staff

Longer ongoing relationships

Better understanding of expectations before project

**Location**

North America: 21%

Europe: 42%

Asia: 9%

Rest of the world: 4%

**Role**

Chemist/scientist: 21%

Director/CEO/VP: 19%

Manager/Group leader: 48%

Technician: 0%

Other: 11%

**Mid-sized Pharma**

91%

85%

**Small-sized Pharma**

78%

70%

**Large Pharma**

70%

64%

**Biotechs**

36%

31%

**Academia**

6%

14%

**Other**

2%

2016

2018

71%

60%

52%

59%