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Physician Demographics

Counts by Country	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Total Respondents	145	126	40	22	57	13	525
Cardiovascular	28%	37%	25%	36%	33%	0%	31%
CNS	17%	7%	28%	23%	28%	8%	16%
Dermatology	1%	4%	3%	0%	5%	0%	4%
Devices & Diagnostics	10%	10%	8%	9%	16%	0%	9%
Digestive System	5%	5%	5%	14%	7%	0%	7%
Endocrine & Metabolic	27%	21%	23%	27%	42%	8%	26%
Genitourinary Disease	4%	10%	15%	0%	12%	15%	8%
Infectious Disease	14%	23%	10%	14%	19%	23%	21%
Musculoskeletal Disease	8%	10%	10%	14%	23%	8%	11%
Oncology	21%	17%	23%	9%	14%	23%	20%
Ophthalmology	1%	6%	0%	5%	5%	0%	3%
Pharmacology	10%	7%	5%	0%	14%	0%	9%
Pain	5%	9%	5%	9%	18%	8%	9%
Respiratory	16%	8%	3%	5%	19%	23%	14%
Transplantation	3%	10%	5%	0%	0%	0%	4%

Background

Average Trials	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Phase I	0.1	0.3	0.0	0.1	0.5	0.0	0.2
Phase II	1.6	1.3	0.9	2.4	2.8	2.9	1.7
Phase III	5.2	5.7	4.3	4.7	7.7	8.0	5.6
Phase IV	1.4	1.8	0.5	0.7	1.5	1.2	1.4

Motives

Average Rating (1-10)	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
For publication or conferences	7.1	7.9	6.9	8.6	7.8	7.7	7.7
In order to enhance my reputation in the medical community	6.4	7.0	6.5	7.2	7.5	7.2	6.9
In order to increase promotion opportunities within my institution	6.3	5.4	6.0	7.3	7.1	6.6	6.2
For free medications for patients who otherwise could not afford them	6.8	6.3	7.5	5.5	8.1	6.7	6.7
To supplement the revenues of my practice or institution	7.2	6.0	6.4	7.3	7.0	6.5	6.5
My experience with the sponsoring company or CRO running the trial	6.2	7.0	7.3	8.5	8.1	7.7	7.5
The amount of start-up money required by my site	6.8	6.3	6.5	7.1	6.0	5.5	6.2
That a pharmaceutical company is managing the trial, not a CRO	6.9	5.7	6.2	8.0	7.5	6.8	6.6
The opportunity to work with potentially first in class drugs	8.8	8.2	9.2	9.2	9.0	8.7	8.7
The sponsor is a large multinational pharmaceutical company	6.6	6.3	6.5	7.5	7.1	7.7	6.7
My own site's experience working in the study's specific indication	8.5	8.4	8.5	9.3	9.0	8.3	8.6
The prospect of additional studies from the sponsor	6.7	7.6	6.4	7.6	7.6	7.5	7.2
My level of confidence in the sponsor's drugs already on the market	7.0	7.2	6.6	7.6	7.9	7.6	7.2
The opportunity to interact with physicians involved in the trial	7.7	7.8	7.6	8.5	8.7	8.0	8.0
The opportunity to share with other physicians outside the trial	7.8	8.0	7.3	8.4	8.5	8.5	8.0
To take part in innovative research even if it does not help my patients	8.5	8.0	9.0	8.8	9.0	8.7	8.5
The amount of start-up money offered by the sponsor	7.0	6.8	6.5	8.0	6.9	6.3	6.7
The timeliness in which the pharmaceutical company or CRO pay	6.9	6.6	6.1	9.0	6.8	6.3	6.8

Reasons for working with a Sponsor Company

Average Rating (1-10)	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Realistic Project Timelines	8.8	8.3	8.9	9.3	8.9	9.0	8.6
Responsiveness to inquiries about study or protocol questions	9.0	8.8	9.0	9.3	9.0	9.0	8.8
Realistic patient enrollment goals	8.9	8.4	9.0	9.3	8.9	8.3	8.6
Effectively works with a CRO conducting a study	7.8		5.7		7.8	6.0	7.3
The quality of the study protocol design	9.2	8.7	9.1	9.7	9.1	9.5	8.9
The quality of the CRF design	8.5	8.4	8.2	9.5	8.8	8.8	8.4
Informative investigator meetings	8.5	8.4	8.8	9.0	8.6	8.9	8.4
Timely drug availability	8.7	8.8	9.1	9.6	9.2	9.5	8.8
The level of funding for patient recruitment	7.8	8.3	7.9	8.9	8.0	8.3	8.0
The level of funding to cover study procedures and site staff	8.6	8.4	8.9	9.4	8.3	8.8	8.5
The quality of the assistance in patient recruitment planning	8.7	8.4	8.5	9.5	8.6	8.7	8.5
The quality of the technology such as Electronic Data Capture	8.2	8.3	8.1	9.1	8.2	8.8	8.2
An efficient query handling process	8.5	8.5	8.5	8.8	8.6	8.9	8.4
The quality of the pharmaceutical company and its medical staff	9.1	9.0	8.9	9.6	8.9	9.4	9.0
The quality of the monitors and CRAs	8.8	8.6	8.8	9.5	8.8	9.2	8.7

Patient Enrollment

Sites Enrollment Performance	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Exceeded Commitment	31%	37%	30%	31%	34%	61%	34%
Did not meet Commitment	12%	8%	15%	10%	12%	4%	12%

Unsatisfactory Site Performance

Percent of Physicians Unsatisfied with their Site's performance	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Patient Recruitment	22%	17%	15%	14%	11%	0%	16%
Patient Retention	8%	3%	3%	5%	9%	0%	6%
Tracking clinical trial costs per budget	34%	37%	40%	27%	25%	46%	33%
Accurately forecasting study budget	38%	37%	38%	36%	32%	46%	36%
Timely collecting of billable milestones	11%	18%	10%	9%	14%	0%	12%
Serious Adverse event SAE reporting	6%	16%	13%	14%	7%	0%	10%
Adverse event follow-up in trial subjects	4%	20%	5%	0%	9%	0%	9%
Study monitor time at your site	16%	4%	15%	9%	16%	15%	13%
Study close out	15%	6%	8%	9%	4%	8%	10%
Tracking clinical trial supplies	22%	10%	13%	23%	14%	0%	16%

Site Info

Average by Country	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Number of Full Time Equivalent (FTEs) Study Coordinators at site	2.3	2.1	1.2	3.4	2.3	1.8	2.1
Percent of trials managed by CROs in the last 3 years	41%	59%	60%	42%	33%	48%	45%
Primarily a Clinical Trial Center	79%	34%	56%	81%	76%	92%	66%
Pharma Managed Last Study	79%	34%	56%	81%	76%	92%	66%
CRO Managed Last Study	63%	66%	74%	38%	61%	36%	60%
Prefer Pharma to Manage Study	15%	15%	16%	10%	27%	42%	26%
Prefer CRO to Manage Study	38%	20%	63%	33%	31%	42%	35%

Site Demographics

Number of Sites	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Academic	14%	39%	8%	18%	21%	8%	20%
Hospital	38%	45%	48%	32%	45%	38%	45%
Private Practice	39%	8%	33%	27%	29%	54%	27%

Companies

P.I.s who thought the company was exceptional ranked by All LATAM rating	Argentina	Brazil	Chile	Colombia	Mexico	Peru	All LATAM
Sanofi-Aventis	48%	50%	48%	36%	52%	38%	46%
Novartis	55%	49%	25%	45%	29%	54%	44%
Pfizer	37%	52%	28%	41%	55%	54%	43%
GSK	36%	33%	45%	14%	39%	54%	34%
AZ	39%	37%	15%	14%	39%	46%	33%
BMS	41%	37%	18%	18%	41%	31%	33%
Roche	37%	37%	18%	9%	43%	31%	32%
Merck	18%	27%	35%	55%	18%	69%	29%
Lilly	29%	23%	18%	5%	41%	31%	26%
Bayer	22%	20%	10%	18%	16%	31%	19%
Boehringer	23%	22%	8%	0%	23%	0%	18%
Amgen	17%	12%	5%	0%	23%	0%	12%
Abbott	12%	17%	3%	9%	14%	31%	12%