

The AI Shortlist

How ChatGPT, Gemini and Google AI Mode pick contract research organizations for US biotech buyers, from the first question to the final RFP.

 **ChatGPT**  **Gemini**  **Google AI Mode**

US CRO Study

October 2026

One CRO question. Three AI tools. Different shortlists.

ChatGPT and Gemini shared only 2 of their top 5 CRO names for the same question.

ChatGPT

1. CRO A
2. CRO B
3. CRO C
4. CRO D
5. CRO E

Gemini

1. CRO J
2. CRO A
3. CRO G
4. CRO H
5. CRO I

Google AI Mode

1. CRO J
2. CRO K
3. CRO A
4. CRO L
5. CRO M

Key findings

49%

of company-naming answers named Medpace, more than any other CRO.

CHAPTER 02

43%

of mentions went to mid-size CROs when the buyer said they were a small biotech, up from 27%.

CHAPTER 03

8 of 10

top long-list names were still in the top 10 at the RFP stage.

CHAPTER 04

2.0

Of five top names shared, on average, by ChatGPT and Gemini for the same question.

CHAPTER 05

39%

of the time, the #1 CRO stayed the same when the same question was asked three times.

CHAPTER 06

2.1 vs 2.2

Names changed when only the city changed, vs. when the same question was asked again.

CHAPTER 07

60%

of mentions went to specialist firms when a head of clinical pharmacology asked.

CHAPTER 09

59%

of cited links pointed to CRO and vendor websites. Trade news was 4%.

CHAPTER 10

14%

of links went to Reddit, Glassdoor and Indeed when buyers asked about a named CRO.

CHAPTER 11

4%

of CRO websites describe their services in a form machines can read.

CHAPTER 12

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The Study

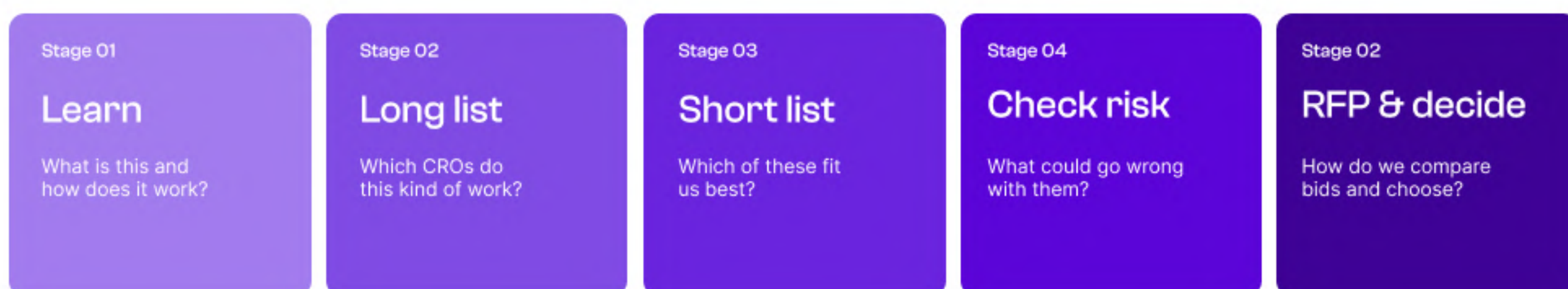
01. Asking AI the way real buyers ask

Biotech teams now ask AI tools for help long before they call a CRO. They ask what a first-in-human trial needs, which CROs work with small companies, what can go wrong, and how to write the RFP.

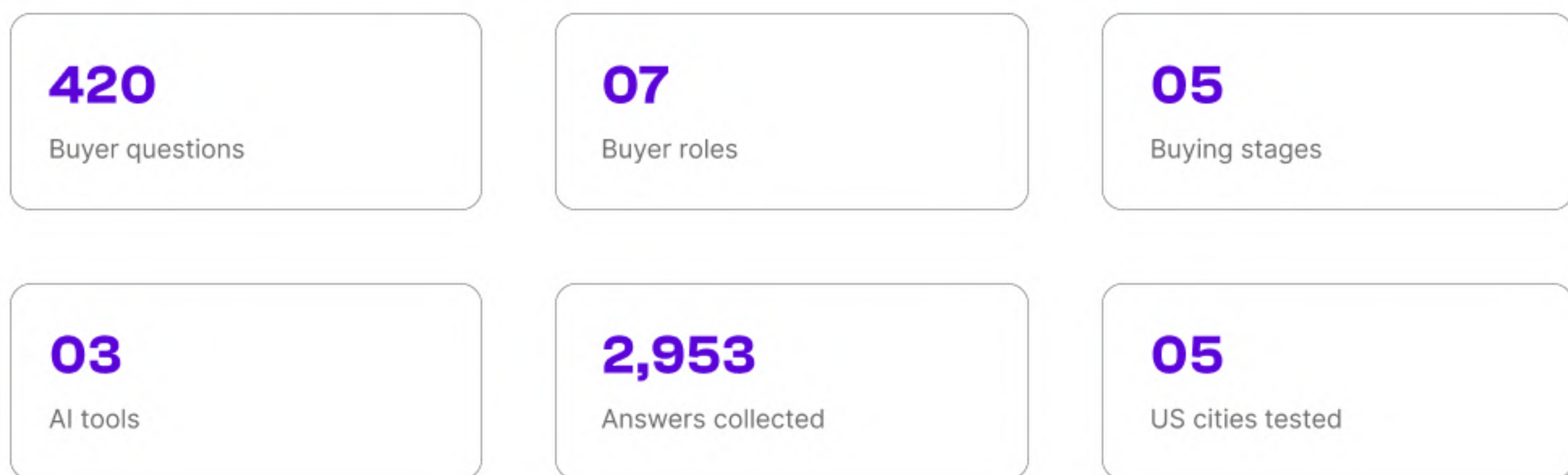
We wrote 420 questions the way these buyers ask them. Each one comes from a real job (a founder, a CMO, a head of clinical operations and four more) at a real stage of picking a CRO. We asked three AI tools every question, asked the company-naming questions three times, and counted every company they named.

The five stages of picking a CRO

Every question sits in one stage. Stages 2 to 5 are where AI names companies.



The study at a glance



Who AI Names

02. A handful of names, then a long tail

Medpace was named in 49% of company-naming answers.
IQVIA was close behind at 48%.

AI named 821 different companies as possible providers across all answers. A small group gets most of the room: the top five took 32% of all mentions, and Medpace, IQVIA and Worldwide Clinical Trials each showed up in more than 40% of company-naming answers.

The tail is very long. Of the 600 providers named in company-naming answers, 459 came up fewer than five times.

The 15 most named CROs

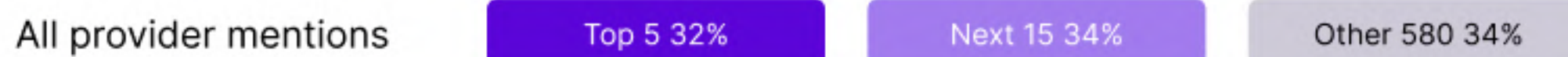
Share of company-naming answers that named each CRO, all three AIs



Mention rate = answers that named the CRO ÷ all answers that named at least one provider. Hover a bar for its average position in the list.

Where the mentions go

Share of all provider mentions in company-naming answers



Size

03. Say you are small, and AI adds mid-size CROs

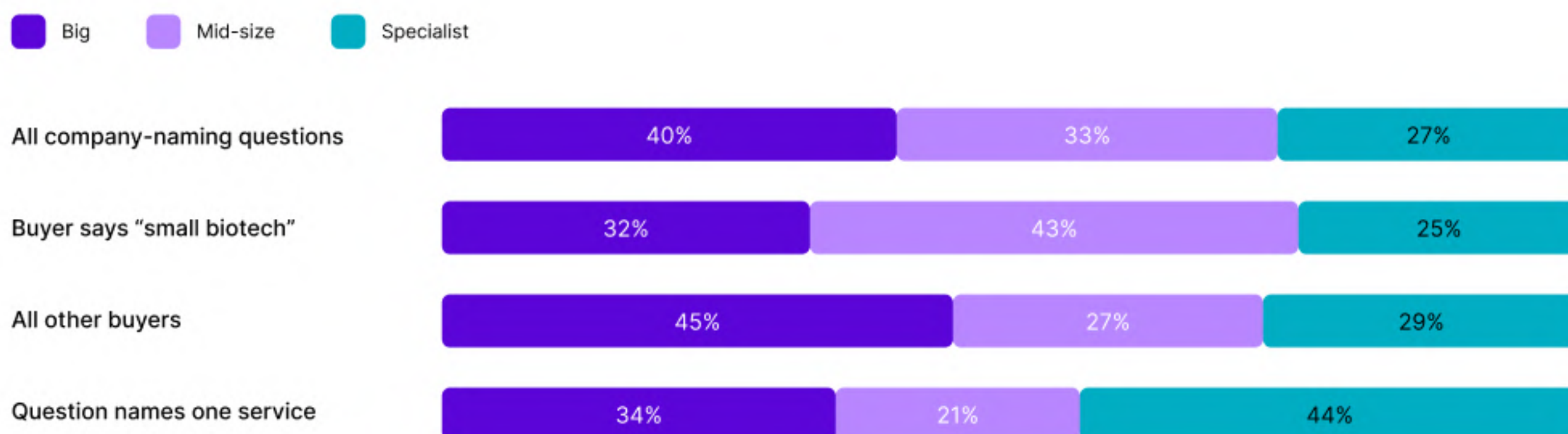
When the buyer said they were a small biotech, mid-size CROs got 43% of mentions, up from 27%. A big CRO was still named first 40% of the time.

When the question said the buyer was a small, early or first-time biotech, AI made more room for midsize CROs. Nearly 1 in 5 company-naming answers warned that small sponsors can get lost at big firms. But it still put a big CRO at the top of the list four times in ten, about the same as for every other buyer.

Specialists did best when the question named one service, like biostatistics or regulatory work.

Mentions by CRO size, by type of question

Share of provider mentions



Big = the 10 largest CROs by revenue (IQVIA, ICON, Thermo Fisher PPD, Syneos Health, Parexel, Fortrea, Medpace, Labcorp, Charles River, WuXi AppTec). Mid-size = full-service CROs outside the top 10. Specialist = firms focused on one service or one disease area, plus labs and site networks. About 6% of mentions were firms we could not place in a group and are left out of these shares.

The Buyer Journey

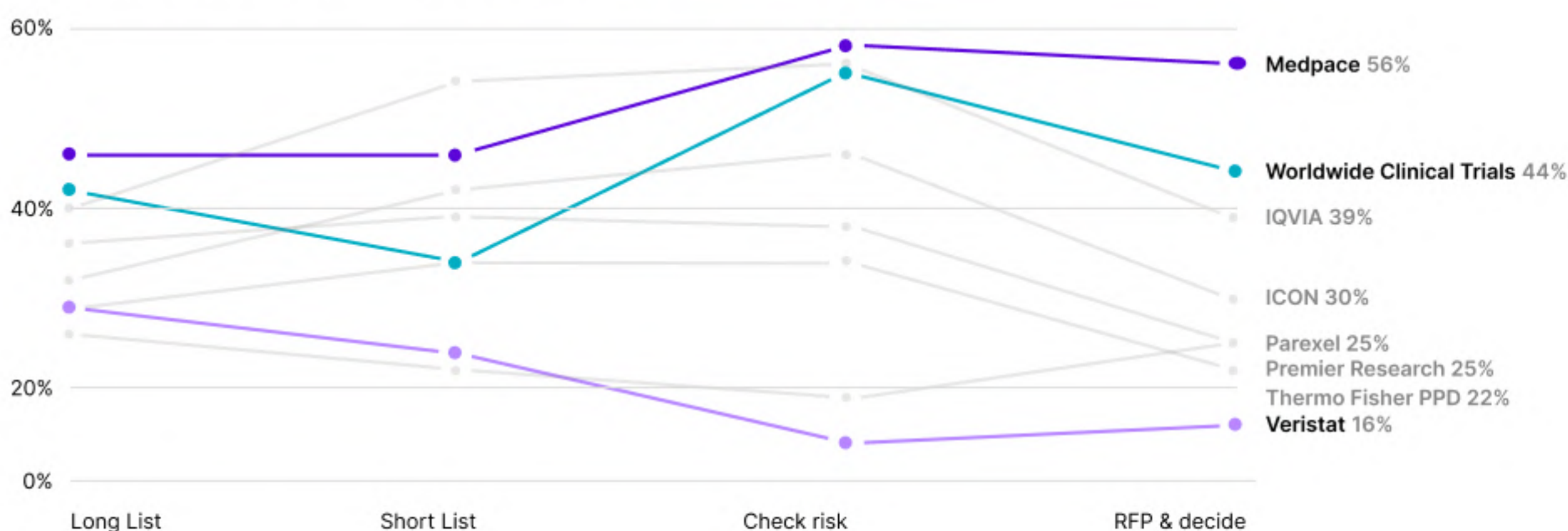
04. The shortlist forms early and holds

8 of the top 10 long-list names were still in the top 10 at the final RFP stage.

Most CROs that AI names when a buyer builds a long list are still named when the buyer checks risk and writes the RFP. The big change happens at the risk check. Medpace and Worldwide Clinical Trials get named more when buyers ask what could go wrong. Veristat drops by half at the same stage.

Mention rate across the buyer journey

Eight most named CROs. Three stories in color.



Company-naming answers per stage: Long list 592, Short list 512, Check risk 219, RFP & decide 64. The RFP stage has the fewest answers, so its numbers move more.

How many of the top 10 long-list names stay in the top 10



WHAT IT MEANS

A CRO that is missing from the long list rarely gets added later.
The first company-naming answers decide most of the shortlist.

05. Each AI has its own list

ChatGPT and Gemini shared just 2.0 of their top five CROs for the same question.

We asked all three AIs the same questions on the same day. Four names made every top five: Medpace, IQVIA, Worldwide Clinical Trials and ICON. Below that, the lists split. Gemini named almost twice as many CROs per answer as the other two. ChatGPT showed a source in almost every answer.

Some of the gap is just chance, since one AI asked twice does not match itself either. But the gap between two different AIs is wider than that.

Top five CROs by AI

Names in bold appear in all three lists

ChatGPT	Gemini	Google AI Mode
1. Worldwide Clinical Trials 2. Medpace 3. ICON 4. IQVIA 5. Parexel 5 providers per answer · sources shown in 98%	1. IQVIA 2. Medpace 3. Worldwide Clinical Trials 4. ICON 5. Thermo Fisher PPD 9.1 providers per answer · sources shown in 71%	1. Parexel 2. Medpace 3. IQVIA 4. ICON 5. Worldwide Clinical Trials 5.5 providers per answer · sources shown in 94%

How many top five names two answers share

Average out of 5, same question, same day. The diagonal is one AI asked the same question twice.

	ChatGPT	Gemini	Google AI Mode
ChatGPT	2.8	2.0	1.8
Gemini	2.0	2.9	1.6
Google AI Mode	1.8	1.6	2.1

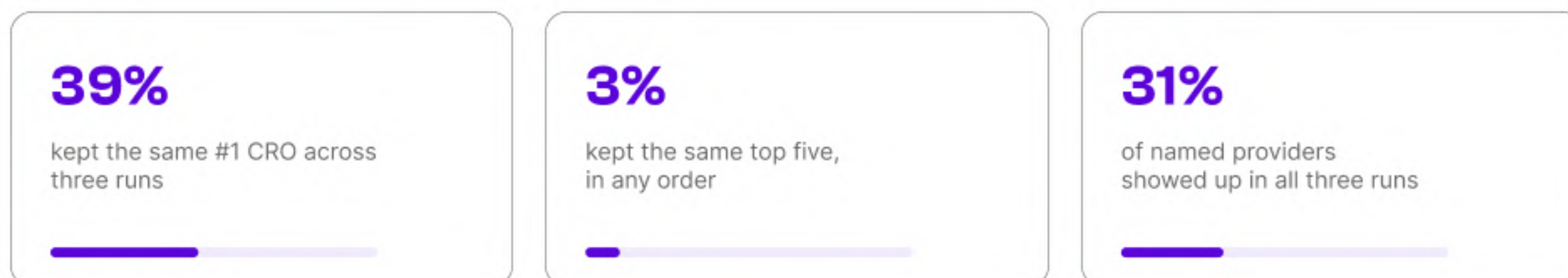
Steadiness

06. Ask again, get a different answer

Asked the same question three times, an AI kept the same #1 CRO only 39% of the time.

We asked every company-naming question three times on each AI. The #1 name changed more often than it held. The full top five almost never came back the same. One screenshot of one answer proves very little. A fair picture needs many questions, asked many times.

Same question, three runs: how often the #1 CRO stayed the same



Location

07. Your city barely matters

Changing the buyer's city changed the top five no more than asking the same question again.

We asked 30 questions from five US biotech hubs, with only the location changed. The lists did move between cities. But they moved about as much as when we asked the same question twice from the same place. So most of the city-to-city change is the normal wobble of AI answers, not a local effect.

City change vs. asking again

Average number of top five names that changed, out of 5

2.1

ChatGPT: names changed between two cities

2.2

ChatGPT: names changed when asked again from the same place

2.9

Google AI Mode: names changed between two cities

3.1

Google AI Mode: names changed when asked again

Mention rate by city

ChatGPT and Google AI Mode, with location set to each city

	Boston	San Francisco	San Diego	New Jersey	Raleigh
Worldwide Clinical Trials	41%	40%	46%	45%	45%
Medpace	46%	42%	39%	41%	30%
Parexel	34%	35%	37%	38%	40%
IQVIA	29%	32%	27%	34%	33%
Allucent	29%	32%	32%	24%	23%
ICON	30%	25%	27%	24%	28%
Veristat	25%	16%	24%	21%	30%
Premier Research	21%	19%	25%	17%	25%

Darker = named more often. About 58 answers per city, so differences under 10 points are within normal wobble.

Context Authority

08. Who owns each service and disease area

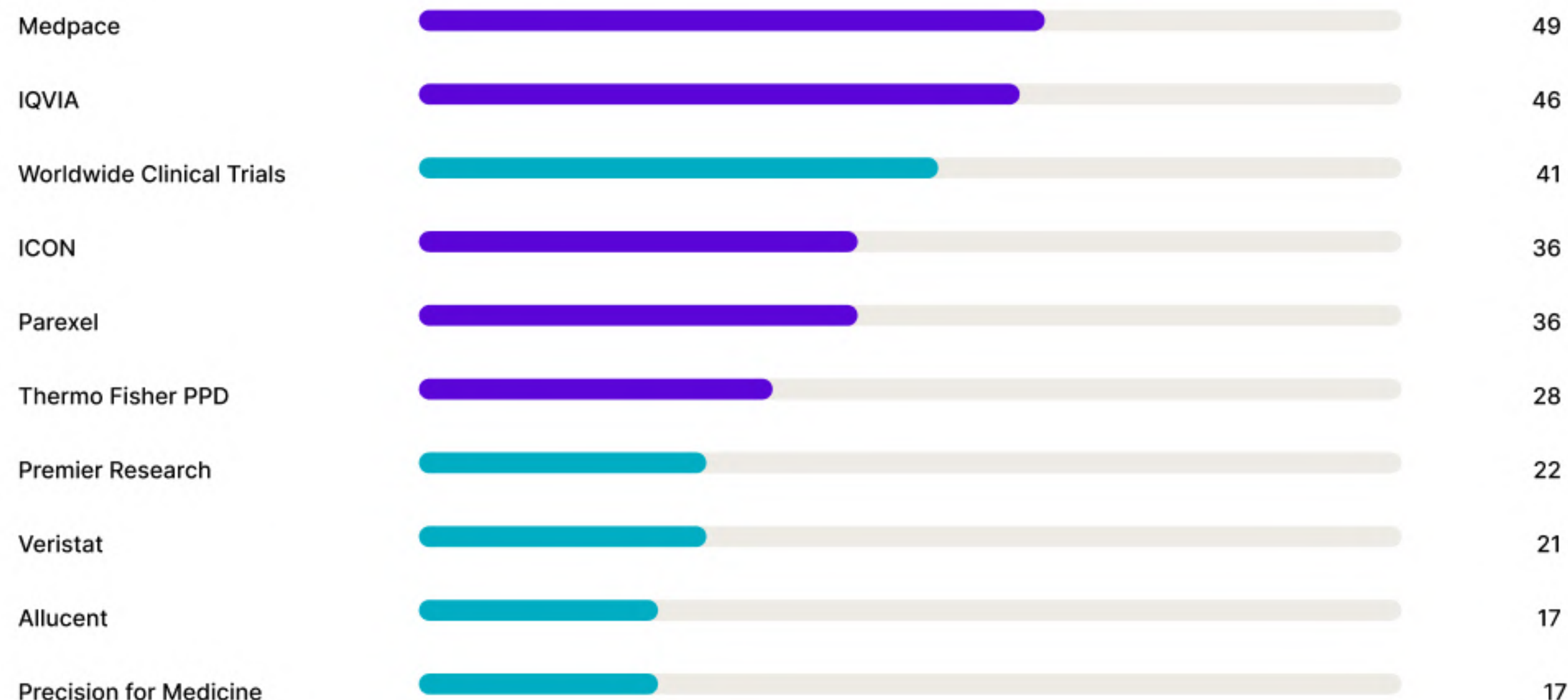
Specialists own their niches. Cytel leads biostatistics and Certara leads clinical pharmacology. Medpace leads 5 of 7 disease areas.

A single "AI rank" hides a lot. A CRO can lead in full-service trials and be missing in biostatistics. So we scored each company inside each service and disease area. We call this score Context Authority. It runs from 0 to 100 and shows how often AI names a company across every buyer role and buying stage in that area. Each score comes with a range that shows how sure we are.

Where the leader scores under 40, nobody owns the area yet. We mark these as open. Areas with fewer than 60 answers are marked as a small sample.

Context Authority, all company-naming questions

Top 10, score out of 100 with 90% range



Leaders by service

Service	Leader	#2	#3	Answers	
Full-service clinical development	Medpace 63	IQVIA 58	Worldwide Clinical Trials 56	704	Held
Early phase / first-in-human	Medpace 56	Worldwide Clinical Trials 51	Novotech 45	89	Held
Biostatistics & programming	Cytel 80	Veristat 67	Quanticate 54	88	Held
Regulatory strategy & submissions	Parexel 62	ProPharma Group 44	IQVIA 42	200	Held
Clinical pharmacology & modeling	Certara 78	Metrum Research Group 58	Simulations Plus 44	132	Held
Drug safety & pharmacovigilance	IQVIA 75	ICON 68	Parexel 63	63	Held
Data management	Veristat 66	Medpace 52	IQVIA 42	52	Held Small Sample
Patient recruitment & site start-up	Worldwide Clinical Trials 77	Medpace 66	Premier Research 63	41	Held Small Sample

Leaders by disease area

Service	Leader	#2	#3	Answers	
Oncology & hematology	Medpace 62	IQVIA 55	Parexel 48	340	Held
Rare disease	Medpace 46	Veristat 45	Premier Research 44	166	Held
Neuroscience	Worldwide Clinical Trials 78	Medpace 49	IQVIA 41	131	Held
Cell & gene therapy	Medpace 51	IQVIA 42	Thermo Fisher PPD 39	108	Held
Immunology & inflammation	Medpace 77	Worldwide Clinical Trials 51	Allucent 42	85	Held
Cardiometabolic	Medpace 67	IQVIA 66	Worldwide Clinical Trials 44	43	Held Small Sample
Infectious disease & vaccines	Emmes 33	IQVIA 31	Thermo Fisher PPD 31	36	Open Small Sample

Buyer Roles

09. Each buyer sees a different market

Heads of clinical pharmacology saw specialist firms in 60% of mentions. Procurement saw them in 11%.

Founders, CMOs and clinical operations leads got almost the same three names. Regulatory and clinical pharmacology leads got a different market, with consultancies and modeling firms near the top. Procurement questions got the fewest specialists of any role.

Top three providers by buyer role

With the share of mentions that went to specialist firms

Buyer role	#1	#2	#3	Specialist share
Biotech founder / CEO	Medpace	Worldwide Clinical Trials	IQVIA	18%
CMO / VP Clinical Development	Medpace	Worldwide Clinical Trials	IQVIA	15%
VP / Director Clinical Operations	Medpace	Worldwide Clinical Trials	IQVIA	14%
Head of Regulatory Affairs	Parexel	ProPharma Group	Veristat	50%
Head of Clinical Pharmacology	Certara	Metrum Research Group	Allucent	60%
Head of Biometrics / Data & Safety	IQVIA	Parexel	ICON	32%
Procurement / Outsourcing	IQVIA	ICON	Worldwide Clinical Trials	11%

Sources

10. What AI reads before it answers

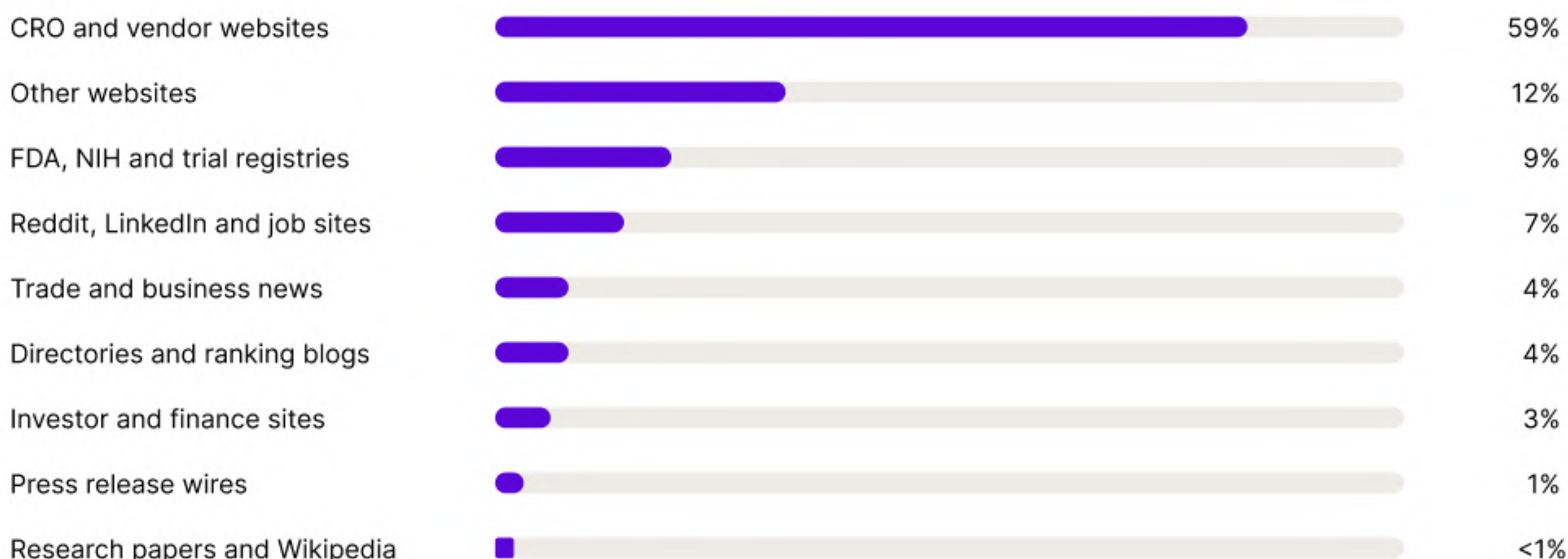
59% of the links AI cited pointed to CRO and vendor websites. Trade news made up 4%.

We saved every link the AIs pointed to, more than 17,000 in all. CRO and vendor websites were the main source by far, and about half of those links went to service pages. FDA pages led the "learn" questions. Trade news and press releases played a small part.

Worldwide Clinical Trials' own website was cited more than any other company site, second only to fda.gov.

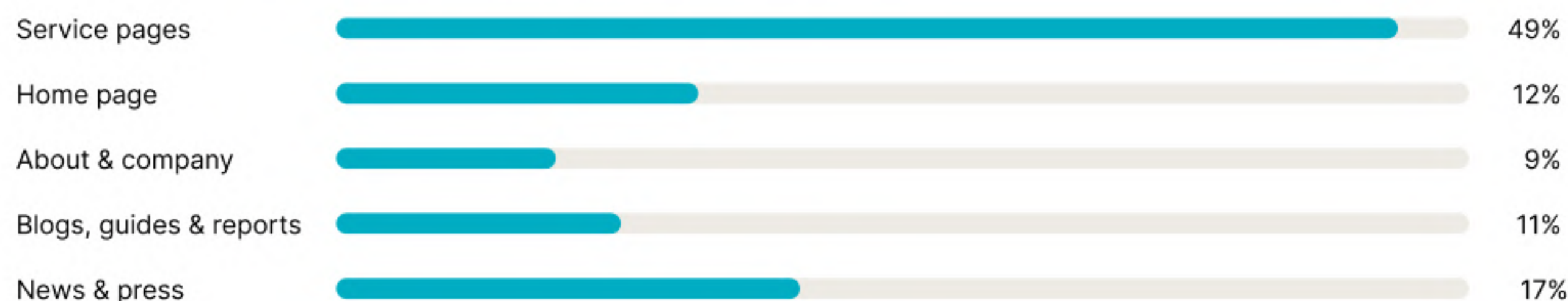
Where cited links come from

Share of all cited links



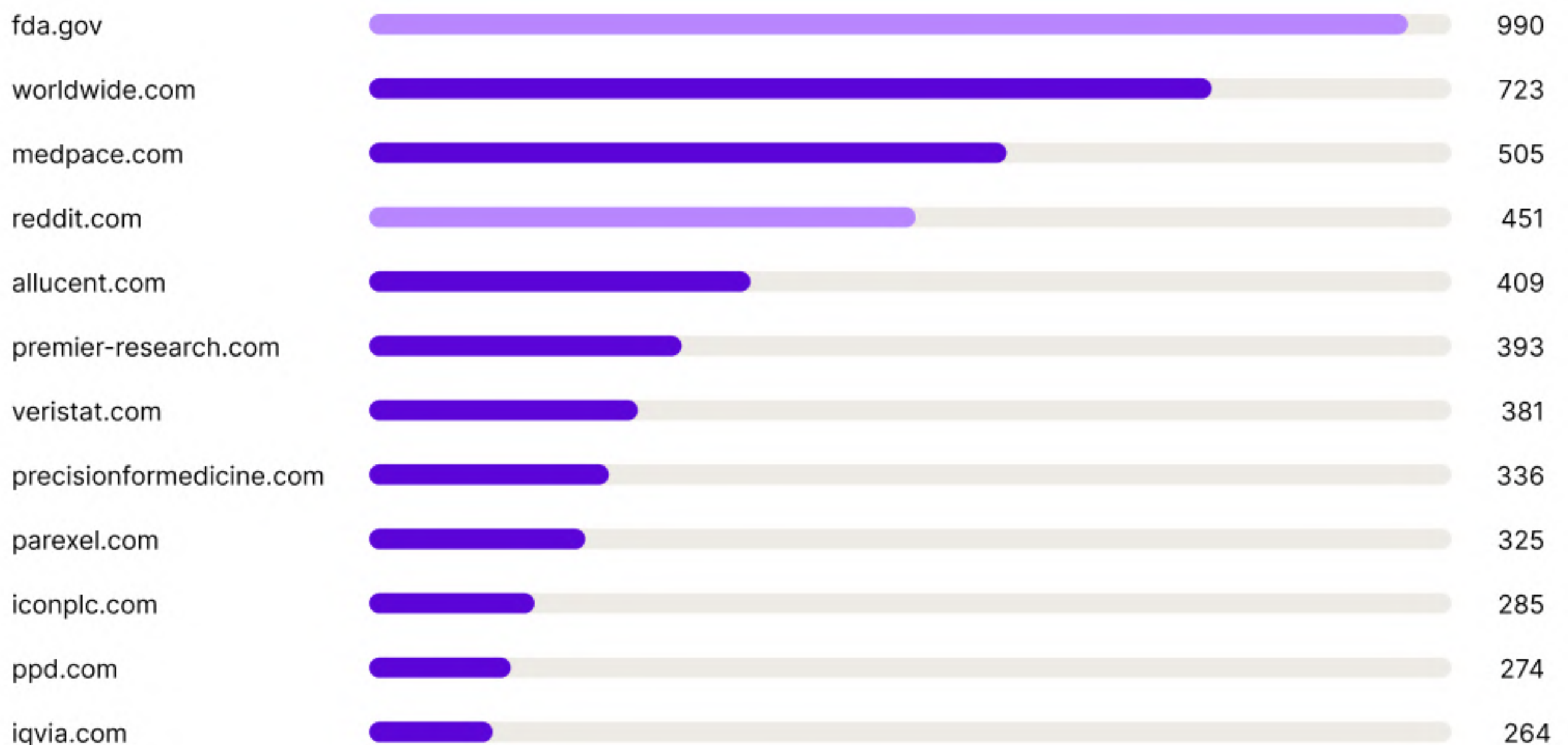
Which pages on CRO websites get cited

ChatGPT and Google AI Mode links to CRO and vendor sites



Most cited websites

Number of times cited, all answers



Dark bars are CRO websites. Light bars are other sites.

17,278

links cited in total

6.5

links per answer, on average

12%

of answers showed no source at all

864

links to Reddit, Glassdoor and Indeed

WHAT IT MEANS

A CRO's own service pages are the content AI reads most. They are the first thing worth fixing.

Asked By Name

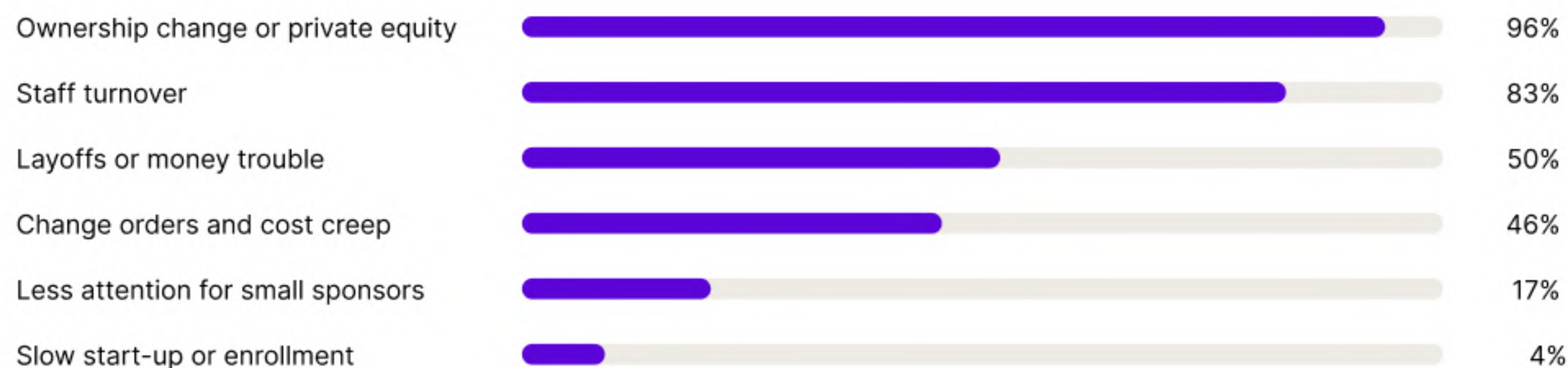
11. What AI says about a CRO before you sign

Asked about a named CRO, AI raised ownership in 96% of answers and staff turnover in 83%.

We asked about 40 CROs by name: "What should a US biotech know before signing with this CRO?" Almost every answer talked about ownership and staff turnover. Half raised layoffs or money trouble. To answer, AI read employee review sites and forums far more than at any other stage.

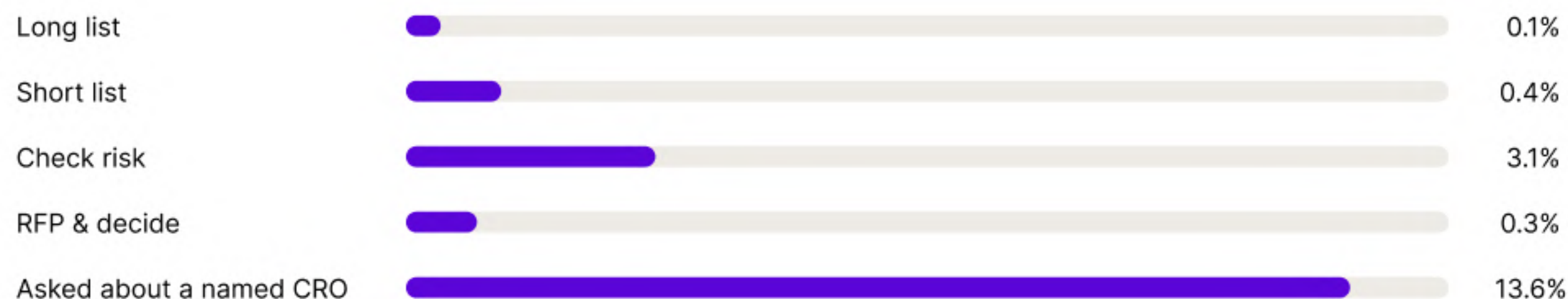
What AI raised when asked about a named CRO

Share of "before signing" answers that mention each topic



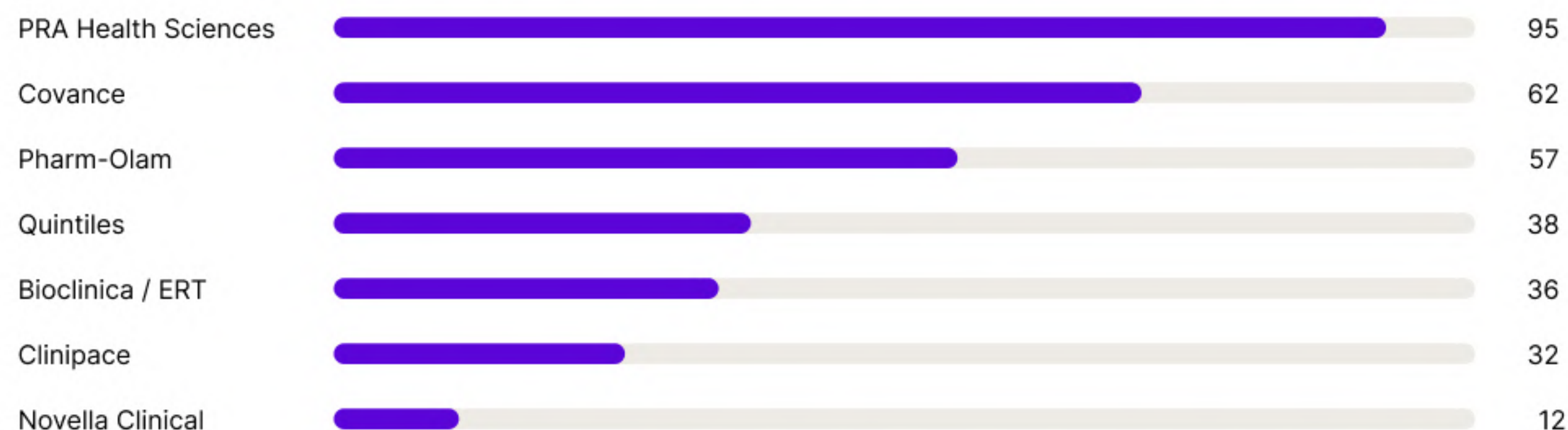
Links to Reddit, Glassdoor and Indeed, by stage

Share of cited links



Old company names still in use

Answers that used a name the company has dropped (mostly as "formerly", sometimes as if it still exists)



14% of company-naming answers used at least one old name: 23% on Gemini, 13% on Google AI Mode and 5% on ChatGPT. Most uses were history notes like "ICON (incl. former PRA)". Some treated an old company as if it still worked that way today.

Two examples we checked. One answer praised "Labcorp Drug Development (formerly Covance)" for end-to-end trial support, but Labcorp spun its clinical arm off as Fortrea in 2023. Another said Caidya came partly from ClinChoice, which is a separate company.

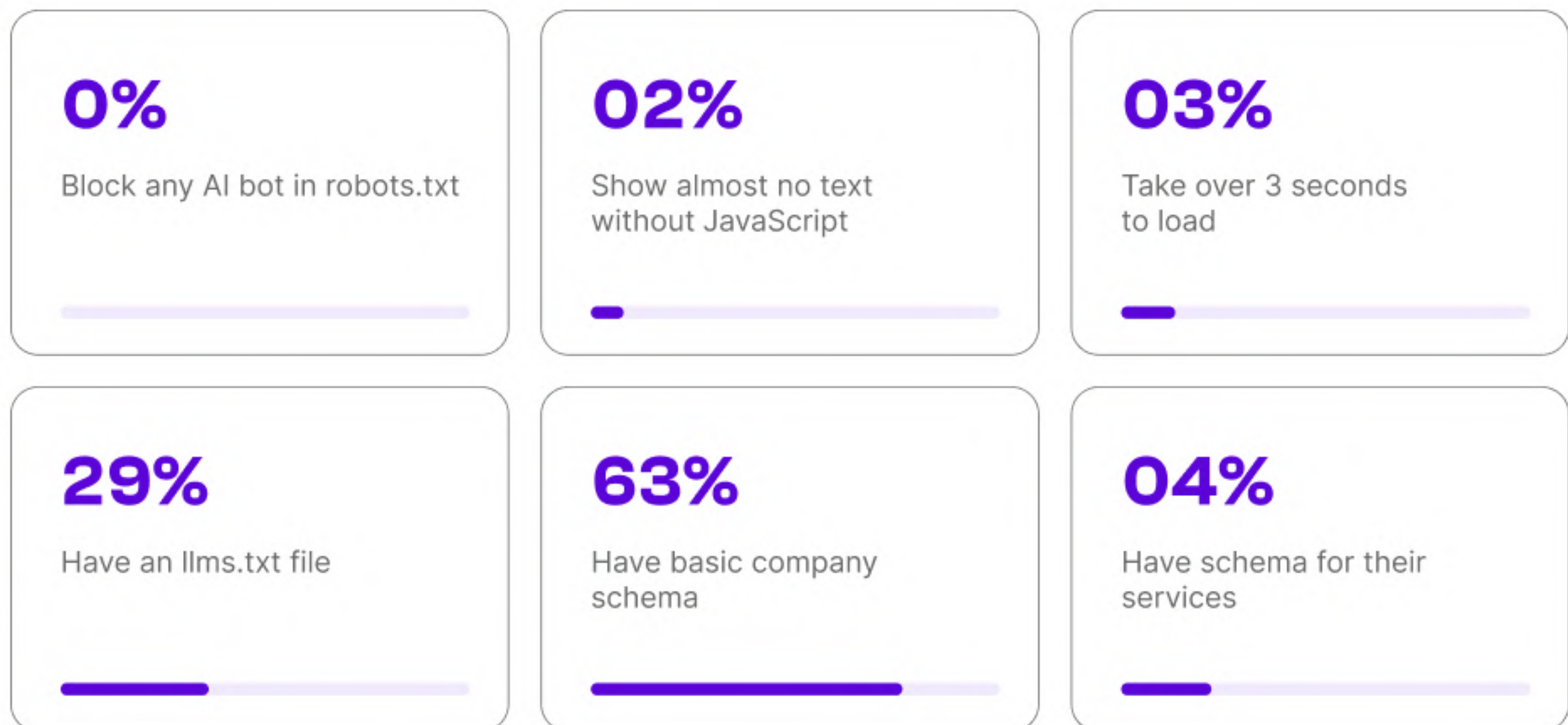
12. Can AI read CRO websites?

None of the 103 CRO websites we could reach block AI bots.
Only 4% describe their services in a form machines can read.

We checked 110 CRO and vendor websites. The good news: the 103 sites we could reach let AI bots in, load fast, and show their text without needing JavaScript. The gap is structure. Most sites never say clearly, in a form machines can read, which services they offer. About three in ten have an llms.txt file, some made automatically by a WordPress SEO plugin.

CRO and vendor websites

Share of the 103 sites we could reach



Robots.txt rules checked for GPTBot, OAI-SearchBot, ChatGPT-User, Google-Extended, PerplexityBot, ClaudeBot, CCBot and Applebot-Extended. 7 more sites turned away our automated visit with an error page, which may also turn away some AI bots.

For CRO Marketing Teams

13. What to do with this

Six steps any CRO marketing team can take, based on what the data shows.

01. Fix your service pages first

CRO websites are the main thing AI reads, and service pages are the most cited part. Make each service and disease area its own clear page, with plain facts AI can quote.

02. Get on the long list

The top 10 at the long-list stage mostly stays the top 10 through the RFP. If AI does not name you when buyers first ask, it rarely adds you later.

03. Know what AI says about your risks

Ask AI what a biotech should know before signing with you. Ownership, turnover and layoffs come up in most answers, often drawn from Reddit, Glassdoor and Indeed.

04. Own one service or disease

Specialists lead when buyers get specific, like Cytel in biostatistics and Certara in clinical pharmacology. Pick the areas where you truly lead and go deep.

05. Clean up old names

AI still uses old company names in 1 of 7 answers. Make sure your current name, owner and services are stated clearly on your site and in public profiles.

06. Measure many times, on each AI

The #1 name changes more often than it holds, and each AI has its own list. Judge your place across many questions, asked again and again, on every AI.

Method

14. How we did it

Questions	420 questions in US English. 300 follow six buyer roles through five stages, 10 per role per stage. 40 more cover procurement. 80 ask about 40 CROs by name. 239 questions ask AI to name companies.
Buyer roles	Biotech founder or CEO, CMO, clinical operations, regulatory affairs, clinical pharmacology, biometrics and safety, procurement.
AI tools	ChatGPT through the OpenAI API (gpt-6.1-sol, web search on, location set to the US). Gemini through the Google API (gemini-3.5-flash, Google Search on). Google AI Mode, collected through DataForSEO (desktop, US, English).
Runs	Company-naming questions were asked 3 times on each AI. Other questions were asked once. City test: 30 questions from Boston, San Francisco, San Diego, Princeton (New Jersey) and Raleigh, once each, on ChatGPT and Google AI Mode.
Date	All answers were collected on 15 October 2026.
Answers	2,994 requested and 2,953 usable. 38 Google AI Mode requests failed with a server error and 3 came back empty.
Counting names	A smaller AI model read every answer and listed each company in order, with its type. We removed hospitals, software, regulators, law firms and investors, then merged names using a list of 250+ provider names and their other names. Position is the order of first mention.
Mention rate	Company-naming answers that name a provider, divided by all company-naming answers that name at least one provider (1,387 answers).
Context Authority	A 0 to 100 score per service or disease area. Each buyer role and stage counts equally, and the score is the share of answers in each that name the company. The range comes from re-sampling the questions 200 times.
Sources	Every link each AI cited (17,278 links), grouped by website type. Gemini only shows the website name, so page types use ChatGPT and Google AI Mode links.
Website check	Home page, robots.txt and llms.txt for 110 CRO and vendor websites, checked on 15 October 2026 with a plain request that does not run JavaScript.

Limits

API answers are close to what people see in the ChatGPT and Gemini apps, but not the same. The apps add personal memory and their own settings.

AI answers change often. This is a snapshot of one day.

US buyers asking in English only.

Big, mid-size and specialist groups are our own labels.

The RFP stage has only 64 company-naming answers, and some service and disease areas have fewer than 60. Treat those numbers with care.

We did not fact-check every claim AI made about named CROs. That check is planned for the next edition.

Appendix A

Sample questions

A few of the 420 questions, across roles and stages.

Buyer role	Stage	Question
Biotech founder / CEO	Learn	What does a full-service CRO actually do for a small biotech, and what should we keep in house?
Biotech founder / CEO	Long list	Which CROs specialize in oncology trials for small and mid-sized biotechs, not big pharma?
Biotech founder / CEO	Check risk	What happens to my trial if my CRO gets bought by another company mid-study?
CMO / VP Clinical Development	Long list	Which CROs have run CAR-T or other cell therapy trials for small biotechs?
VP / Director Clinical Operations	Check risk	Which mid-size CROs are financially stable enough to bet a two-year trial on?
Head of Regulatory Affairs	Long list	Which CROs have former FDA or EMA regulators on their teams?
Head of Clinical Pharmacology	Short list	Which Phase 1 units are best for a first-in-human study in the US? Compare the top options.
Procurement / Outsourcing	Short list	Which CROs have the lowest change order rates, based on what sponsors say?
Named-company check	Check risk	What should a US biotech know before signing with [CRO]? Include any recent ownership changes, leadership changes or common complaints.

Appendix B

Words we use

CRO	Contract research organization. A company that runs clinical trials and related work for drug makers.
Provider	Any CRO, consultancy, lab or site network that AI names as an option.
Mention rate	How often AI names a provider, out of all answers that name any provider.
Position	Where a provider first appears in an answer. 1 means named first.
Context Authority	A 0 to 100 score for how strongly AI links a company to one service or disease area.
Open area	A service or disease area where the top company scores under 40.
Buyer stage	Where the buyer is in picking a CRO, from Learn to RFP & decide.