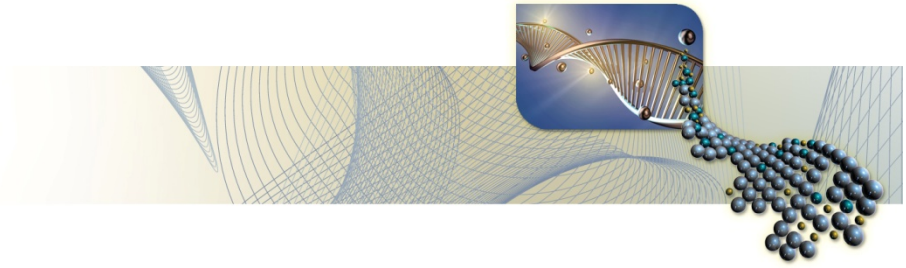
CONNECTICUT



Connecticut has a specialized and diverse concentration of employment in the overall bioscience industry and in two of its subsectors: drugs and pharmaceuticals (location quotient of 2.01) and medical devices and equipment (1.73). Its research, testing and medical laboratories subsector is highly concentrated (location quotient of 1.11) and growing. Academic research expenditures in biosciences were $595 million in 2008, representing 81 percent of all academic R&D, which is much higher than the national average. On a per capita basis, Connecticut ranks very high among states in terms of both academic bioscience R&D and NIH funding. Over the last six years, venture capital invested in Connecticut bioscience companies ($991 million) and bioscience patents issued (2,615) both placed higher than its rank by population. The two largest categories for venture capital investment were human biotechnology and pharmaceuticals. Patents were heavily concentrated in drugs and pharmaceuticals.

Bioscience Performance Metrics

Summary of State Performance in Selected Bioscience-related Metrics

Metrics	Connecticut	United States	Rank*
Bioscience Industry, 2008			
Total Bioscience Industry Employment, 2008	25,842	1,420,324	II
Bioscience Industry Location Quotient, 2008	1.44	n/a	I
Biosciences Industry Establishments, 2008	670	47,593	III
Academic R&D Expenditures, FY 2008			
Bioscience R&D ($ thousands)	$594,509	$31,818,810	16
Bioscience Share of Total R&D	81.2%	61.3%	3
Bioscience R&D Per Capita	$169.72	$104.54	4
Change in Bioscience R&D, FY 2004–08	13.7%	22.3%	35
NIH Funding, FY 2009			
Total, Including ARRA Funds ($ thousands)	$546,124	$25,837,590	13
Per Capita Funding	$155.22	$84.16	5
Change in Baseline Funding, FY 2004–09**	4.6%	-4.7%	16
Change in Total Funding, FY 2004–09	23.7%	14.6%	20
Clinical Trials, Initiated 2009	307	5,299	25
Higher Education Degrees in Bioscience Fields, AY 2008	1,867	161,811	31
Employment in Bioscience-related Occupations, 2008	10,290	717,510	21
Bioscience Venture Capital Investments, 2004–09 ($ millions)	$990.7	$60,099	13
Bioscience and Related Patents, 2004–09	2,615	75,593	11

*State ranking figures for bioscience industry employment metrics are calculated as quintiles (I=Top Quintile; V=Bottom Quintile). All other metrics are ranked 1-52.
**Baseline Funding does not include American Recovery and Reinvestment Act (ARRA) funds for 2009.
For source notes, see end of State Profile.

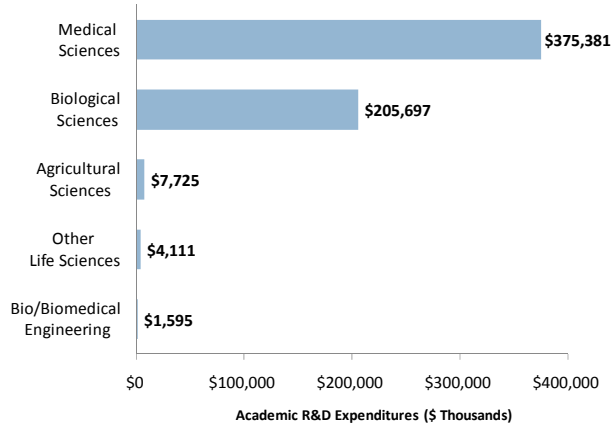
Bioscience Industry Base, 2008

INDUSTRY SUBSECTOR	Connecticut		United States	
	2008	2001–08 Change	2008	2001–08 Change
AGRICULTURAL FEEDSTOCK & CHEMICALS				
Establishments	22	20.6%	2,440	16.0%
Employment	635	-48.5%	114,793	1.9%
Location Quotient	0.44		n/a	
Direct-Effect Employment Multiplier	5.02		11.33	
Total Employment Impact	3,189		1,284,650	
Average Annual Wage	$85,318		$72,279	
DRUGS & PHARMACEUTICALS				
Establishments	35	20.7%	2,771	6.4%
Employment	7,926	-26.7%	311,882	2.3%
Location Quotient	2.01		n/a	
Direct-Effect Employment Multiplier	5.76		9.92	
Total Employment Impact	45,639		2,873,278	
Average Annual Wage	$125,702		$93,378	
MEDICAL DEVICES & EQUIPMENT				
Establishments	215	-4.9%	15,227	0.4%
Employment	9,487	3.5%	435,509	2.0%
Location Quotient	1.73		n/a	
Direct-Effect Employment Multiplier	2.89		4.87	
Total Employment Impact	27,458		2,029,581	
Average Annual Wage	$63,334		$63,606	
RESEARCH, TESTING, & MEDICAL LABORATORIES				
Establishments	398	33.3%	27,154	57.7%
Employment	7,794	11.6%	558,140	46.1%
Location Quotient	1.11		n/a	
Direct-Effect Employment Multiplier	2.17		3.30	
Total Employment Impact	16,937		1,853,127	
Average Annual Wage	$99,459		$80,785	
TOTAL BIOSCIENCES INDUSTRY				
Establishments	670	17.2%	47,593	28.3%
Employment	25,842	-8.3%	1,420,324	15.8%
Location Quotient	1.44		n/a	
Direct-Effect Employment Multiplier	3.61		5.82	
Total Employment Impact	93,223		8,040,636	
Average Annual Wage	$93,898		$77,595	
TOTAL PRIVATE SECTOR				
Establishments	109,479	4.6%	8,860,956	13.8%
Employment	1,437,602	0.5%	113,917,377	3.5%
Average Annual Wage	$59,305		$45,229	

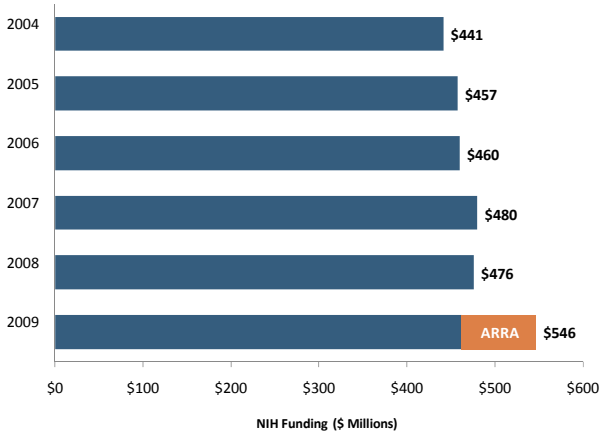
Note: U.S. employment metrics include Puerto Rico. Estimates of total employment impacts do not include Puerto Rico.

Bioscience Performance Metrics

Bioscience Academic R&D Expenditures in Connecticut, FY 2008

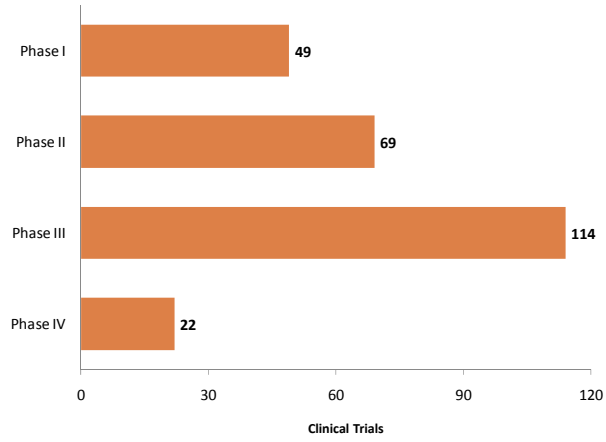


NIH Awards in Connecticut, 2004–2009

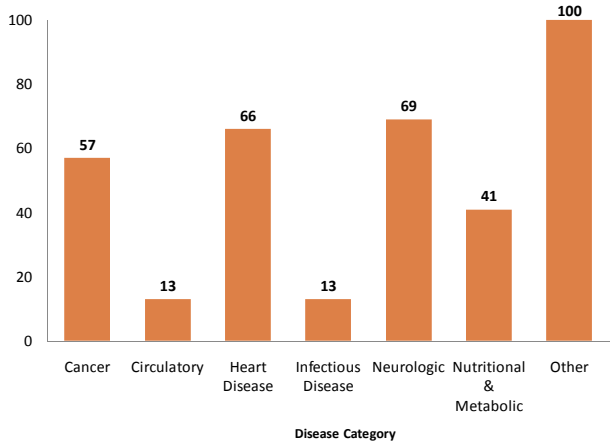


Recent Clinical Trial Activities

Clinical Trials by Phase in Connecticut, 2009

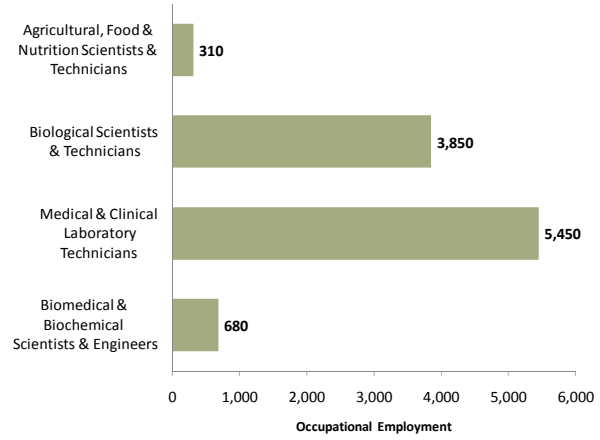


Clinical Trials by Major Disease Category in Connecticut, 2009

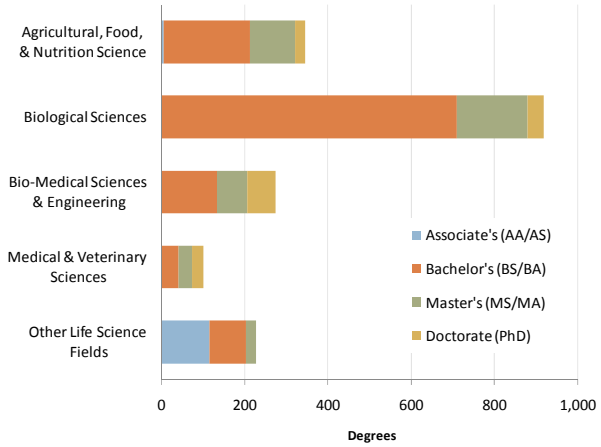


Bioscience Talent Base

Bioscience-related Occupational Employment in Connecticut, 2008

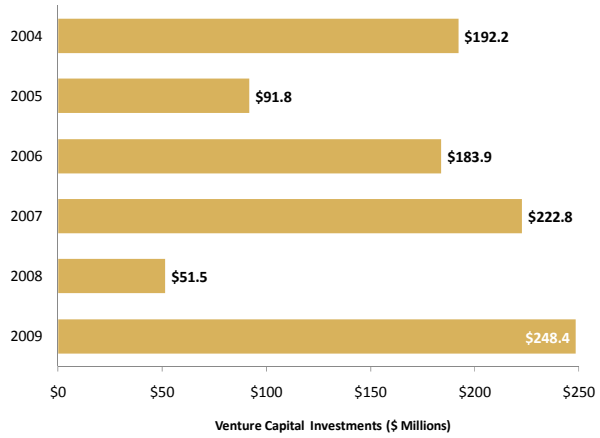


Bioscience-related Degrees in Connecticut, AY 2008

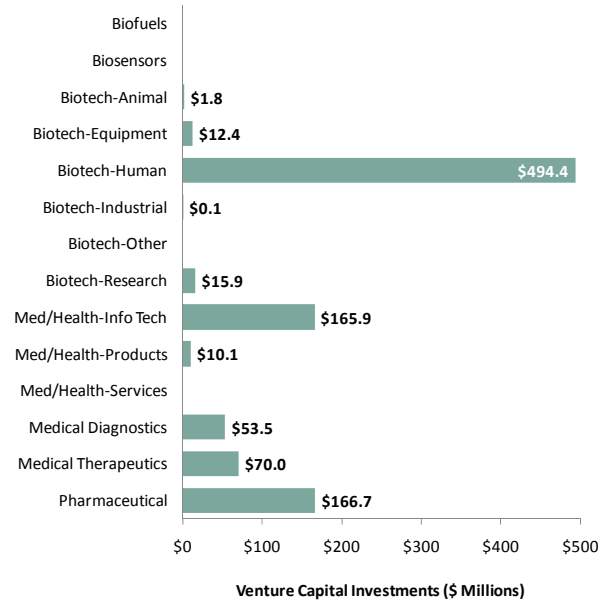


Bioscience Venture Capital

Bioscience-related Venture Capital Investments in Connecticut, 2004–2009

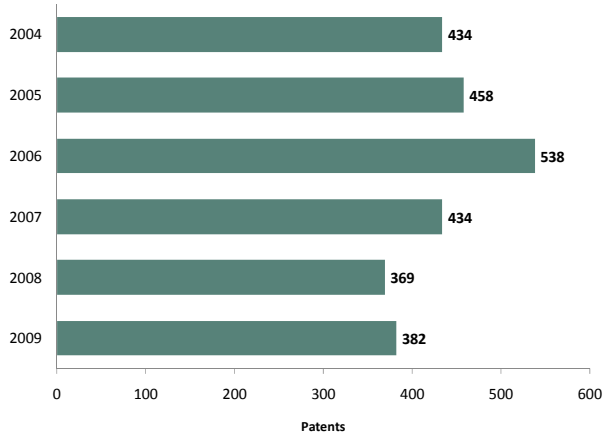


Bioscience-related Venture Capital Investments in Connecticut by Segment, 2004–2009

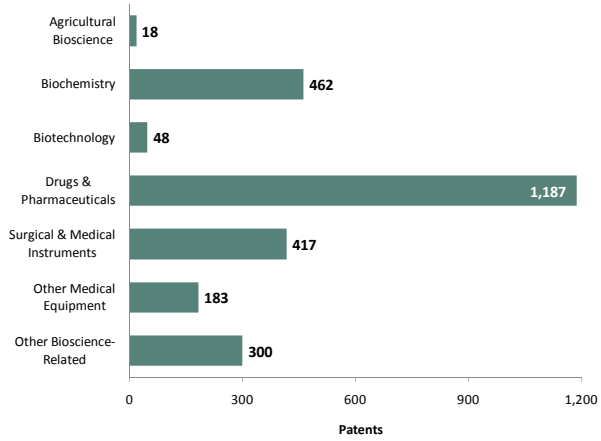


Bioscience Patents

Bioscience-related Patents in Connecticut, 2004–2009



Bioscience-related Patents by Classification Group in Connecticut, 2004–2009



State Bioscience Contact

Connecticut United for Research Excellence, Inc (CURE)
300 George Street, Suite 561
New Haven, CT 06511
P: (203) 777-8747
F: (203) 777-8754
www.curenet.org

Source Notes:

Employment, Establishment, and Wage Data: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW) industry data provided by the Minnesota IMPLAN Group, 2001 and 2008.

Employment Multipliers: U.S. Bureau of Economic Analysis RIMS II Employment Multipliers, 2006 (most currently available).

Academic R&D Expenditures: National Science Foundation (NSF) Survey of Research and Development Expenditures at Universities and Colleges, 2004 and 2008.

NIH Funding: National Institutes of Health, Office of Extramural Research, Award Trends, Dollars Awarded by State, 2004 and 2009.

Clinical Trials: National Institutes of Health**,** Clinicaltrials.gov, trials that were initiated in 2009.

Higher Education Degrees: National Center for Educational Statistics, Integrated Postsecondary Education Data System (IPEDS), 2008.

Occupational Employment: U.S. Bureau of Labor Statistics, Occupational Employment Statistics (OES) survey data, 2008.

Venture Capital: Thomson Reuters' VentureXpert Database, 2004–2009, as of January 15, 2010.

Patents: U.S. Patent & Trademark Office data as available from the Thomson Reuters' Delphion Patent Analysis Database, 2004–2009, as of January 15, 2010.

For a more detailed discussion of the data and methodology used, please see the Appendix to the full national report. ©2010