



**THE FUTURE OF CLINICAL
RESEARCH SITES SERIES FINALE:**

2022 Year in Review & Look to 2023



Before We Kick-Off Today's Event...



1

We will be recording today's webinar. **24-hours following the event**, you will receive an email with a link to the recording, as well as a Certificate of Attendance.

2

If at any time during today's broadcast you would like to **submit questions to our speakers**, please insert them into the chat function on your screen.

3

We'll answer questions throughout the live session, and we'll get through as many of them as we can. **Please submit your questions as you have them!**

Meet Today's Speakers



Suzanne Caruso
Senior Vice President,
Insights & Analytics, WCG



Michael Gordon, M.D.
Chief Medical Officer, HonorHealth
Research & Innovation Institute



Sandy Smith, RN, MSN, AOCN
Senior Vice President, Clinical Solutions
& Strategic Partnerships, WCG



Ryan Jones
Cofounder and CEO,
Florence Healthcare

The Future of Clinical Research Sites Webinar Series - Recap of Parts 1-10



Polling Question #1



Michael Gordon, M.D.

Chief Medical Officer, HonorHealth
Research & Innovation Institute

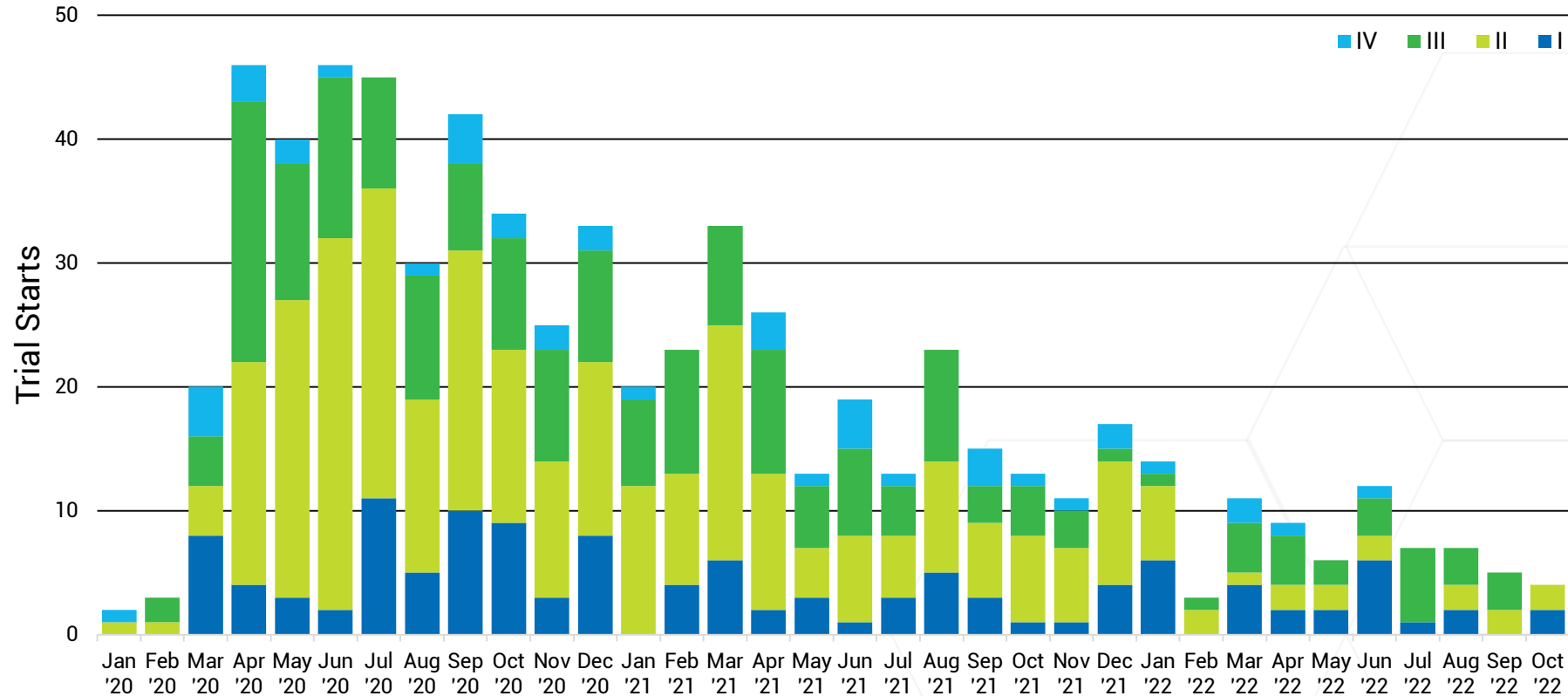
Polling Question #2



Suzanne Caruso

Senior Vice President,
Insights & Analytics, WCG

The COVID Clinical Trial Landscape: There Have Been Over 700 US Study Starts Since Q1 2020



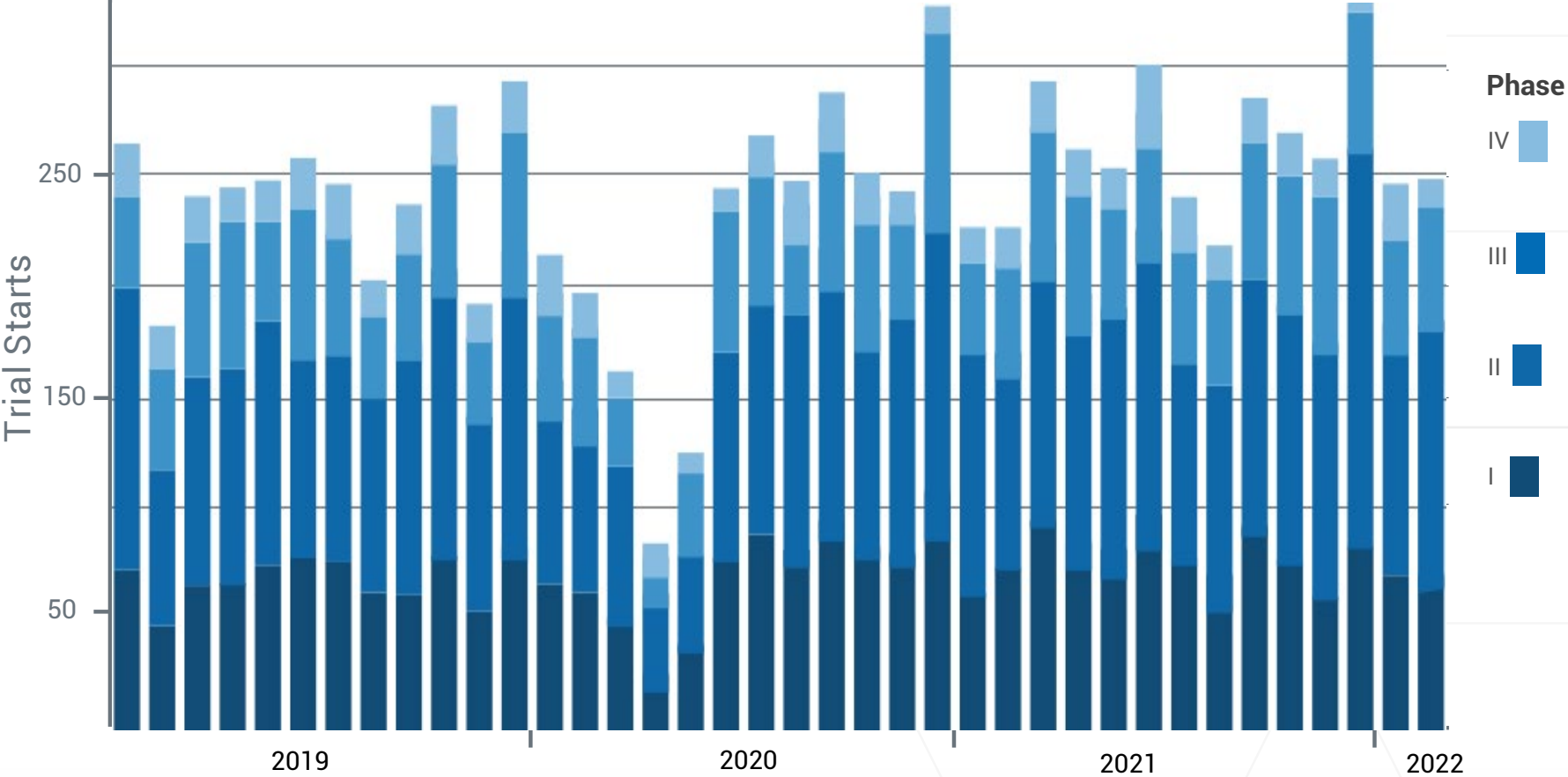
We Expect To See A
Small Number Of
COVID/COVID
Booster Trials
Continue Over The
Next 12 Months

*Preliminary October data for industry sponsored COVID-19 trial starts in the U.S.; excluding planned trial data.

Beginning of 2022: More Clinical Trials Starts Than Ever Before



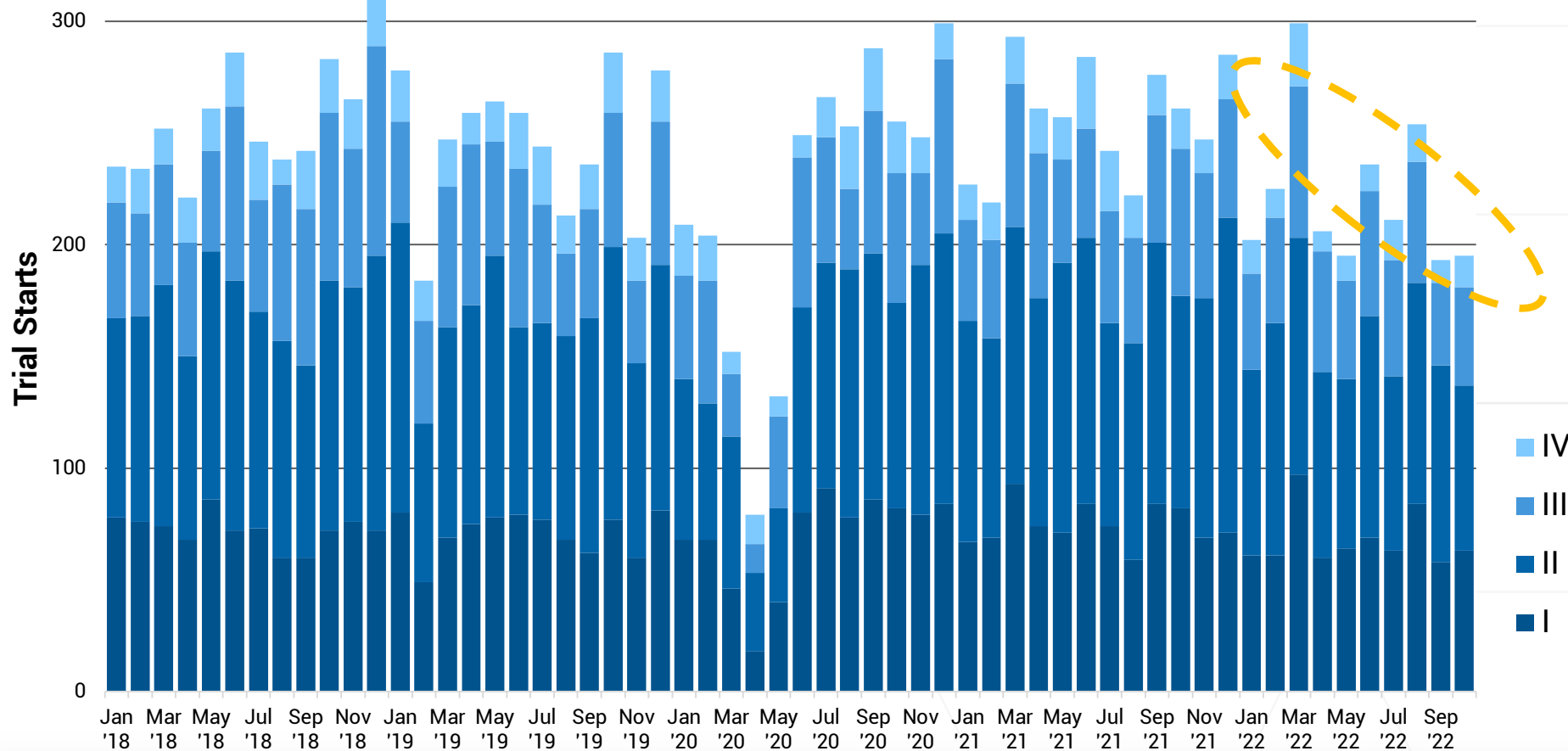
Industry Outlook In Early 2022 (Q1)



In The Beginning
Of 2022, We
Expected A Year
Similar To The
End Of 2021

...And By The End of 2022: Study Starts Had Slowed Significantly

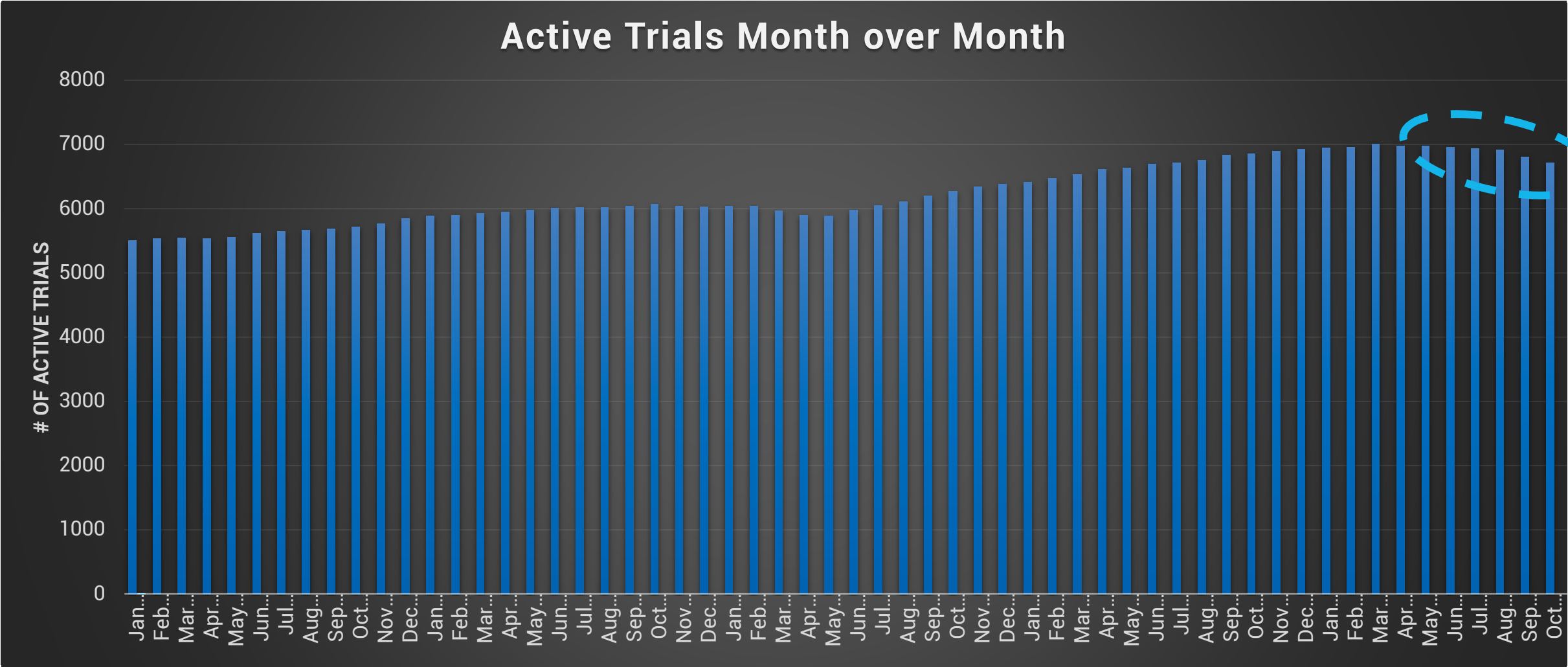
Industry Outlook Through Q3



10%+
Decrease in
Study Start

*Preliminary October data.
Ph I – Ph IV, industry-sponsored trial
starts with at least 1 US site.;
excluding planned and COVID trials.

Active Trial Landscape:
The Number of Active Clinical Trials Are Decreasing



Sponsor Insights: The Number of Sponsors Has Decreased Through Nov '22

# Of Unique Sponsors By Trial Starts For Studies That Include At Least 1 US Site		
Market Segment	Jan - Nov 2021	Jan - Nov 2022
Small Pharma (5 or fewer trial starts)	1562	1446
Mid-Size Pharma (6 or more trial starts)	113	105
Large Pharma (Top 20)	20	20
Total # of Sponsors	1695	1571

-8%

-9%

-8%

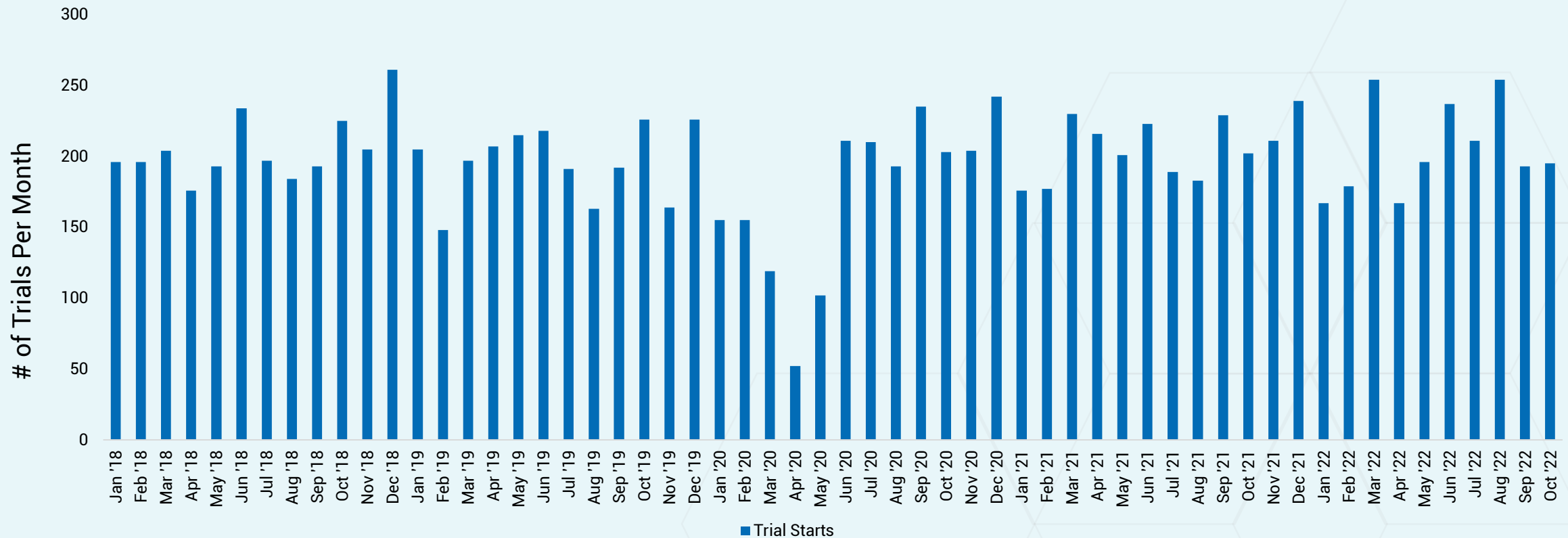
# of Unique Sponsors by Trial Starts Globally (No US Site Requirement)		
Market Segment	Jan - Nov 2021	Jan - Nov 2022
Small Pharma (5 or fewer trial starts)	3321	2777
Mid-Size Pharma (6 or more trial starts)	199	189
Large Pharma (Top 20)	20	20
Total # of Sponsors	3540	2986

-16%

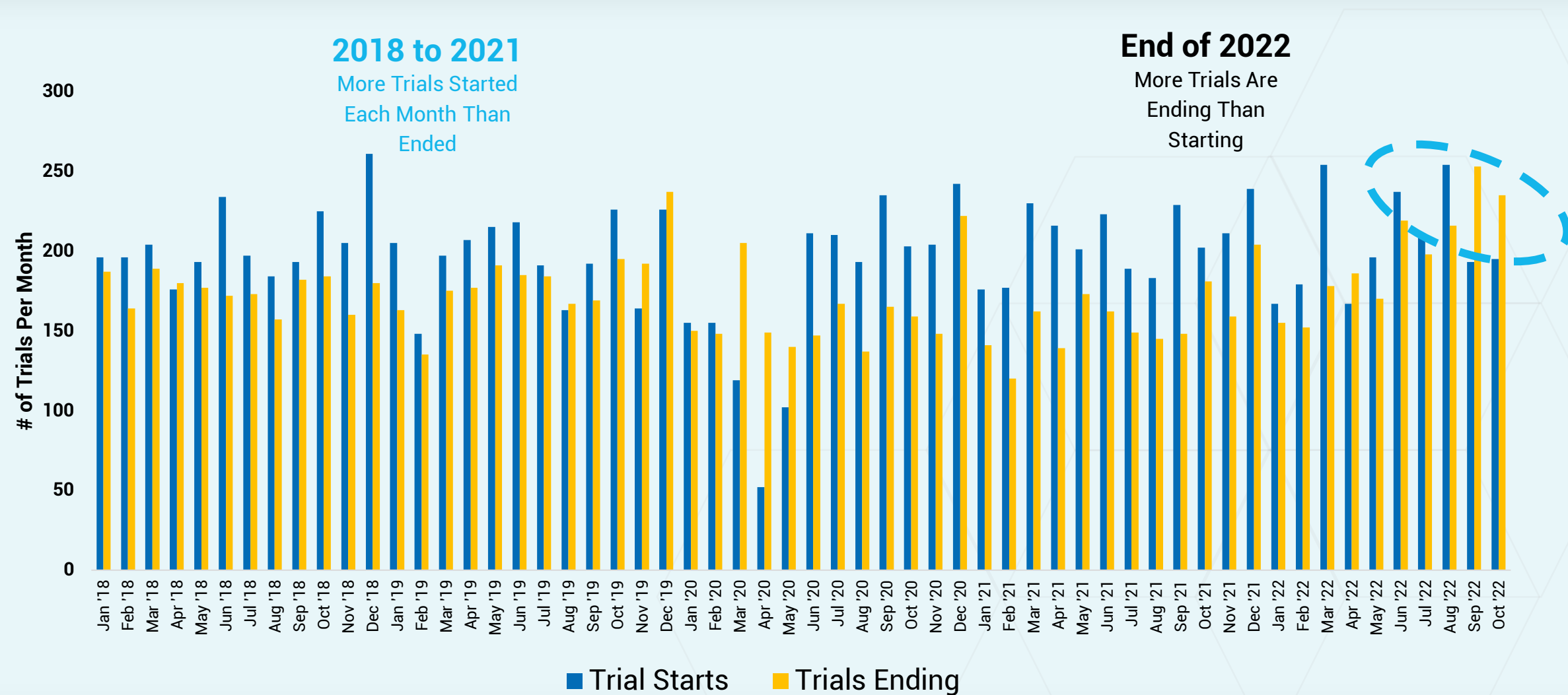
-5%

-15%

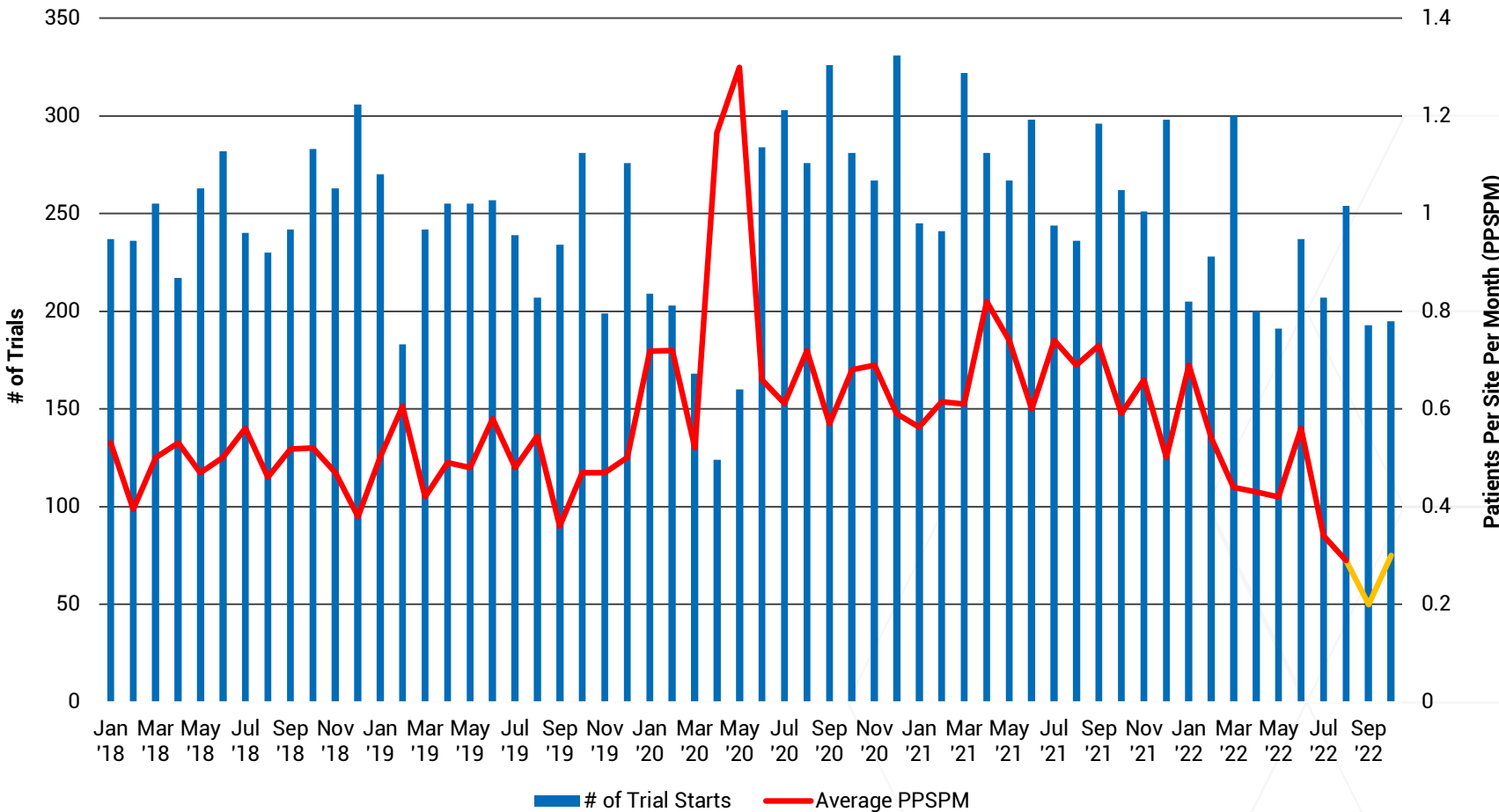
Industry Insights: For The First Time In Years, We Are Seeing More Trials Closing Than Opening



Industry Insights: For The First Time In Years, We Are Seeing More Trials Closing Than Opening



Enrollment Rates Continue to Decline



The Patient Per Site Per Month* Average Declined

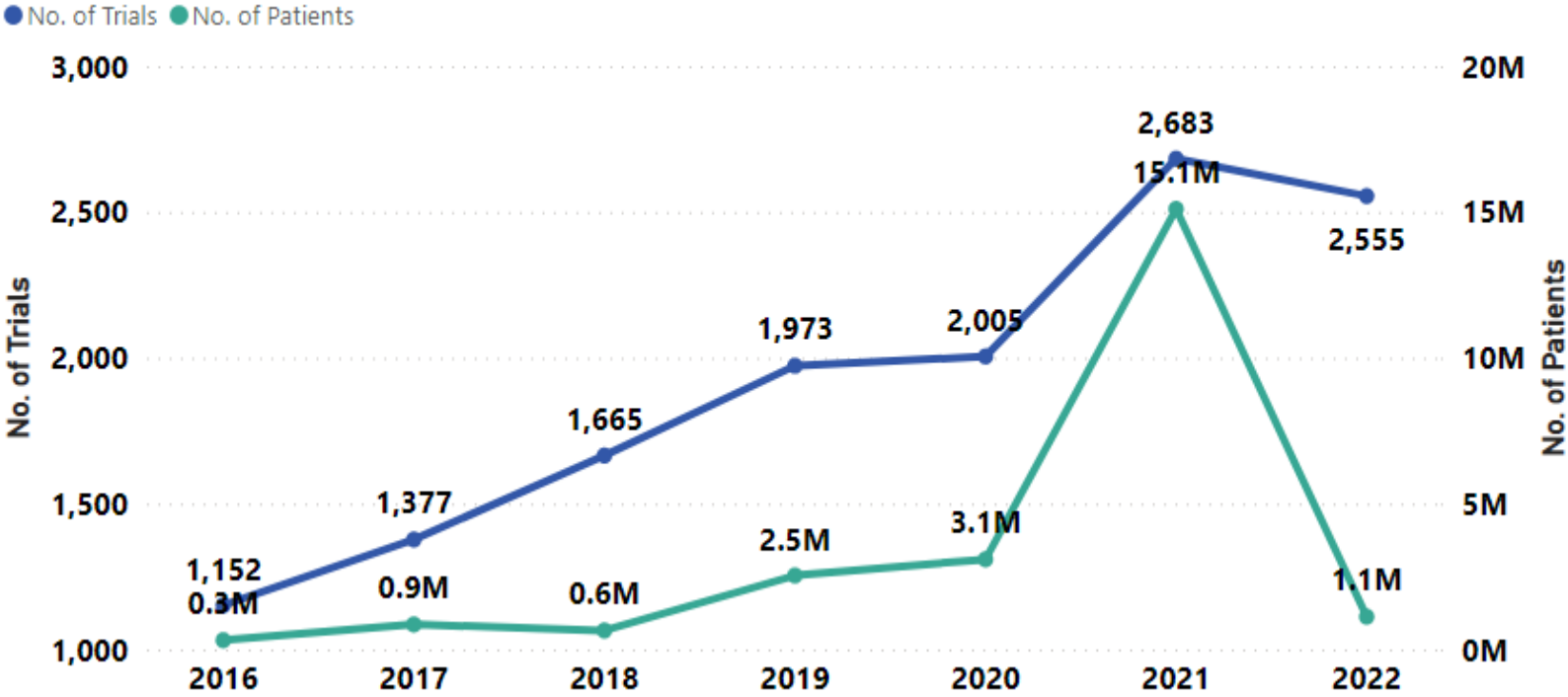
16%

In Q2 '22 as compared to Q1 '22

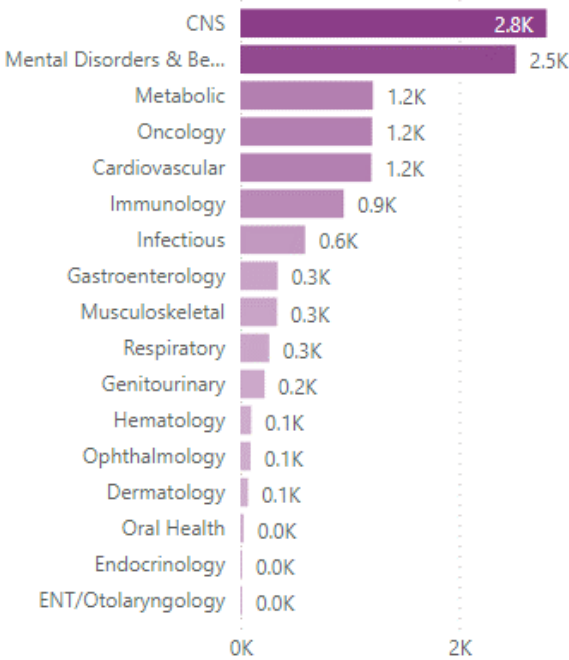
PPSPM is the average monthly rate of patient enrollment per site based on actual accrual (or target accrual if actual accrual is unavailable), number of sites, and enrollment duration

*Industry sponsored, Ph I – Ph IV trial starts with up to 250 reported sites and a blended PPSPM between 0.1 – 10.0; only active and completed trials are included with a start date between 1/1/2020 – 10/31/2022 with at least 1 site in the U.S.; Excluding COVID-19 trials.

The Number of Trials With Decentralized Components Clinical Trials Continues to Increase



Therapeutic Areas Utilizing DCT Components Most Frequently

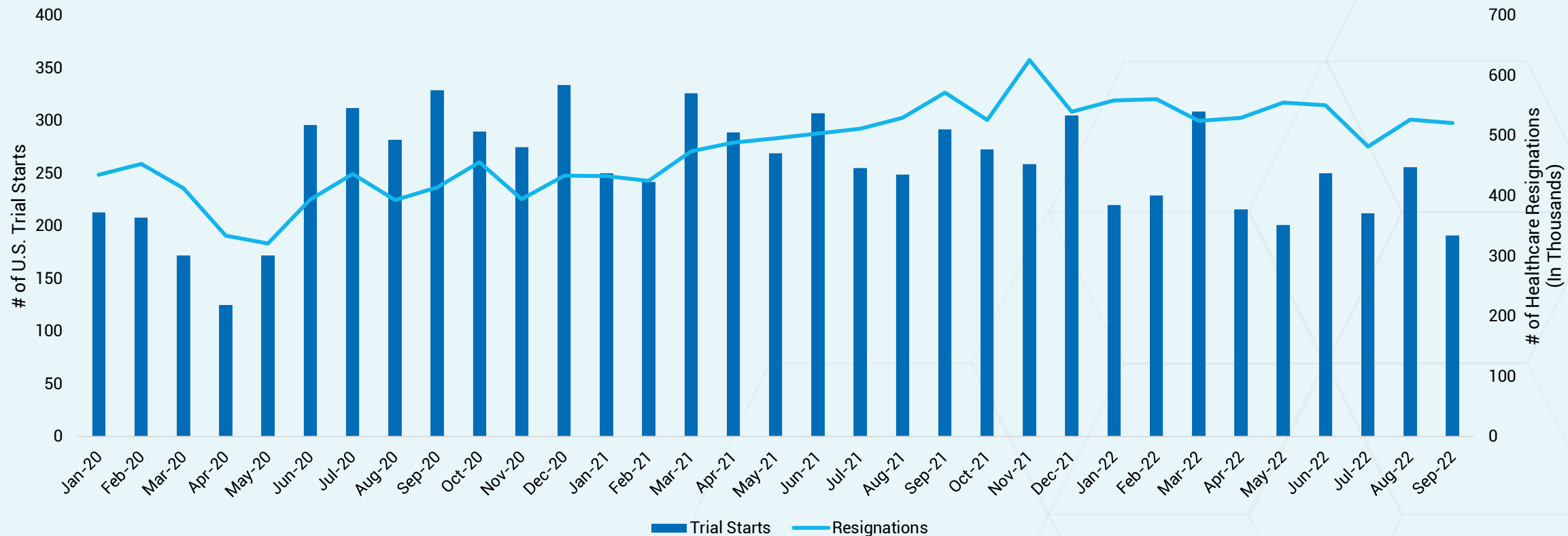


Examples of DCT Components Include: digital Biomarkers, Digital Diaries, electronic consent, Fitness Trackers, Home Health Providers, Ingestible Sensors, ipads, Medical Event Remote Monitoring Systems, Virtual Clinics, Smartwatches, Smart Phone Apps, etc*

The Great Resignation: Voluntary Resignations Continue to Be At All-Time Highs



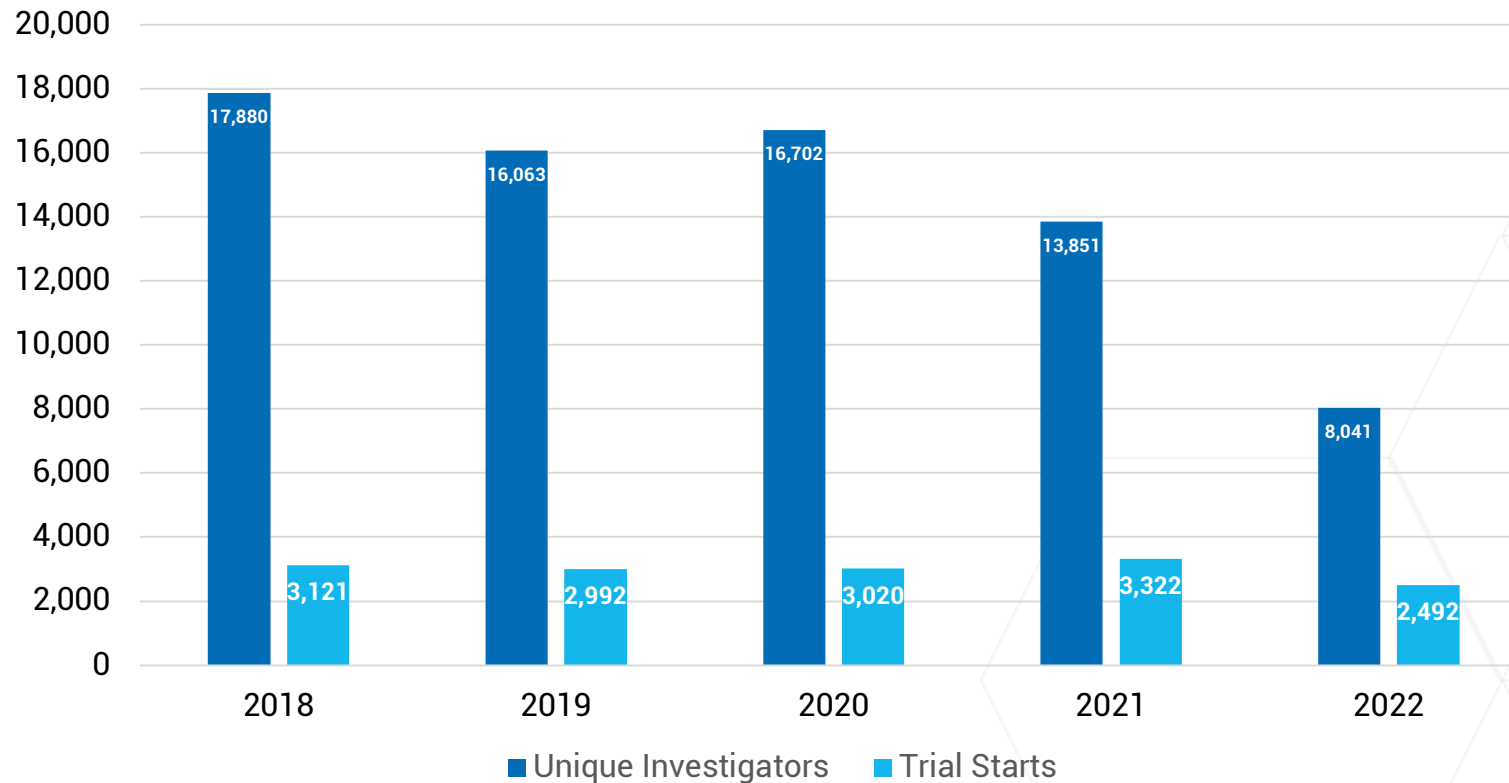
Voluntary Resignations Continue to Outpace Previous Years



Source: WCG Knowledge Base and the U.S. Bureau of Labor Statistics

The Number of Investigators Participating in Clinical Trials Is Decreasing Over Time

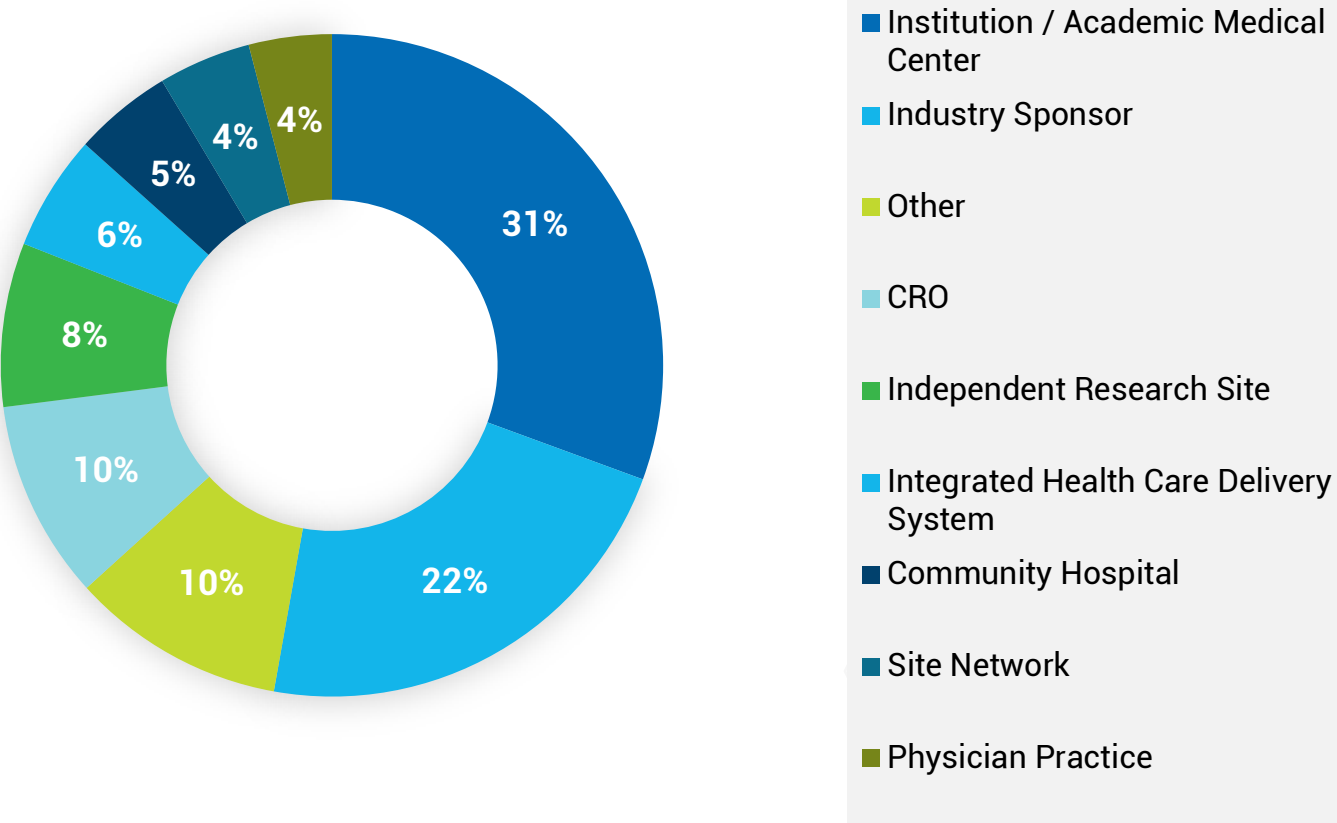
U.S. Investigators



We expect the number to **increase** but not reach the number of unique investigators doing research last year.

*Preliminary October data. Ph I – Ph IV, industry-sponsored trial starts with at least 1 US site.; excluding planned and COVID trials.

Attendance Distribution by Organization Type



3,012

Distinct Sites

11,207

Total Participants

425+

Total Questions Submitted

The Webinar Focused On Budgets
Had The Largest Number Of
Attendees, Followed Closely By
The Great Resignation

Polling Question #3



Ryan Jones

Cofounder and CEO,
Florence Healthcare



2022: Site Enrollment Changed Forever

Precision medicine = narrows pool of subjects

DE&I mandates = more effort required to source subjects



Sponsor Strategies

Frontier sites were added to meet people where they are

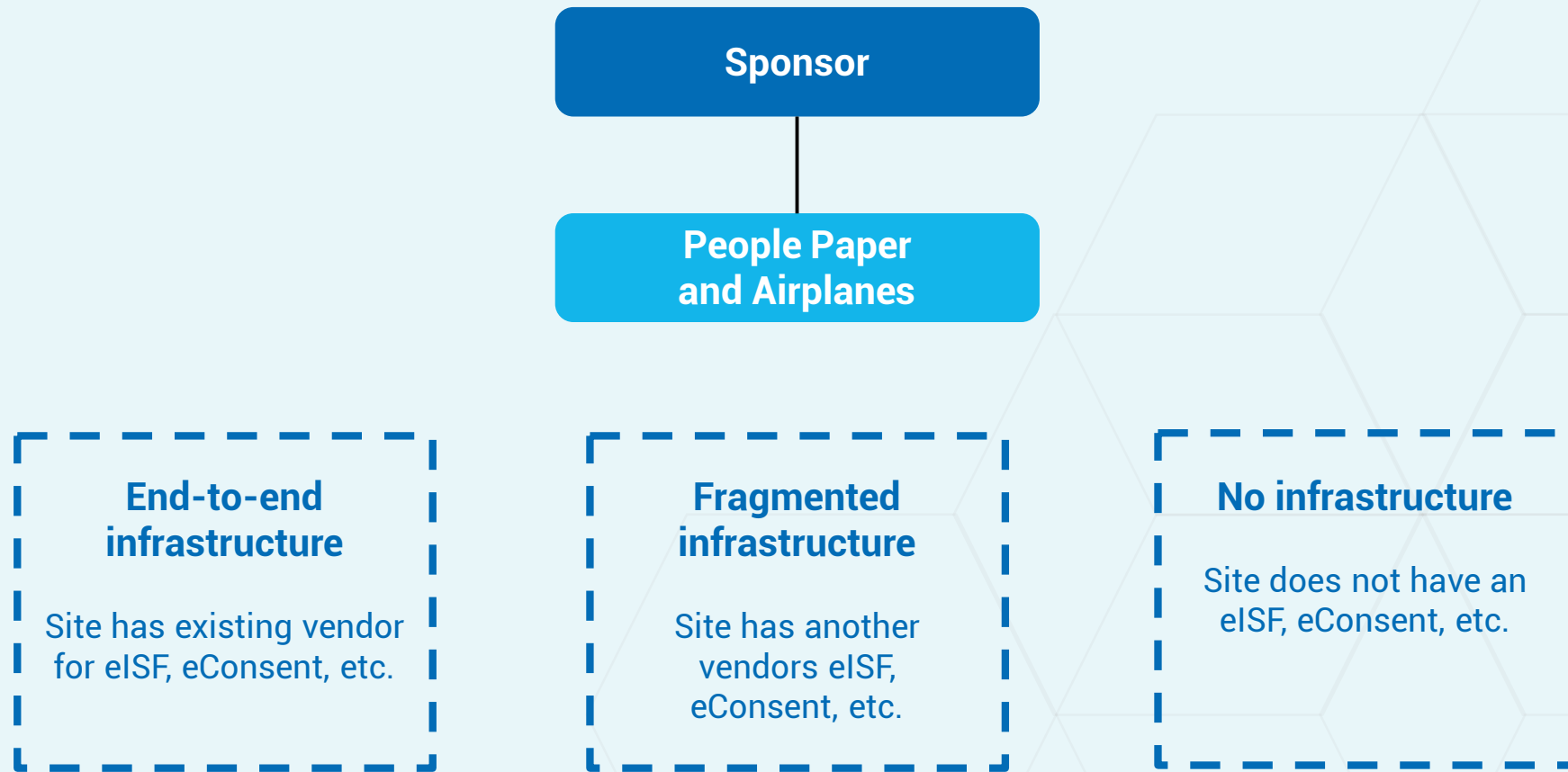
DCT apps were introduced to broaden access to different populations



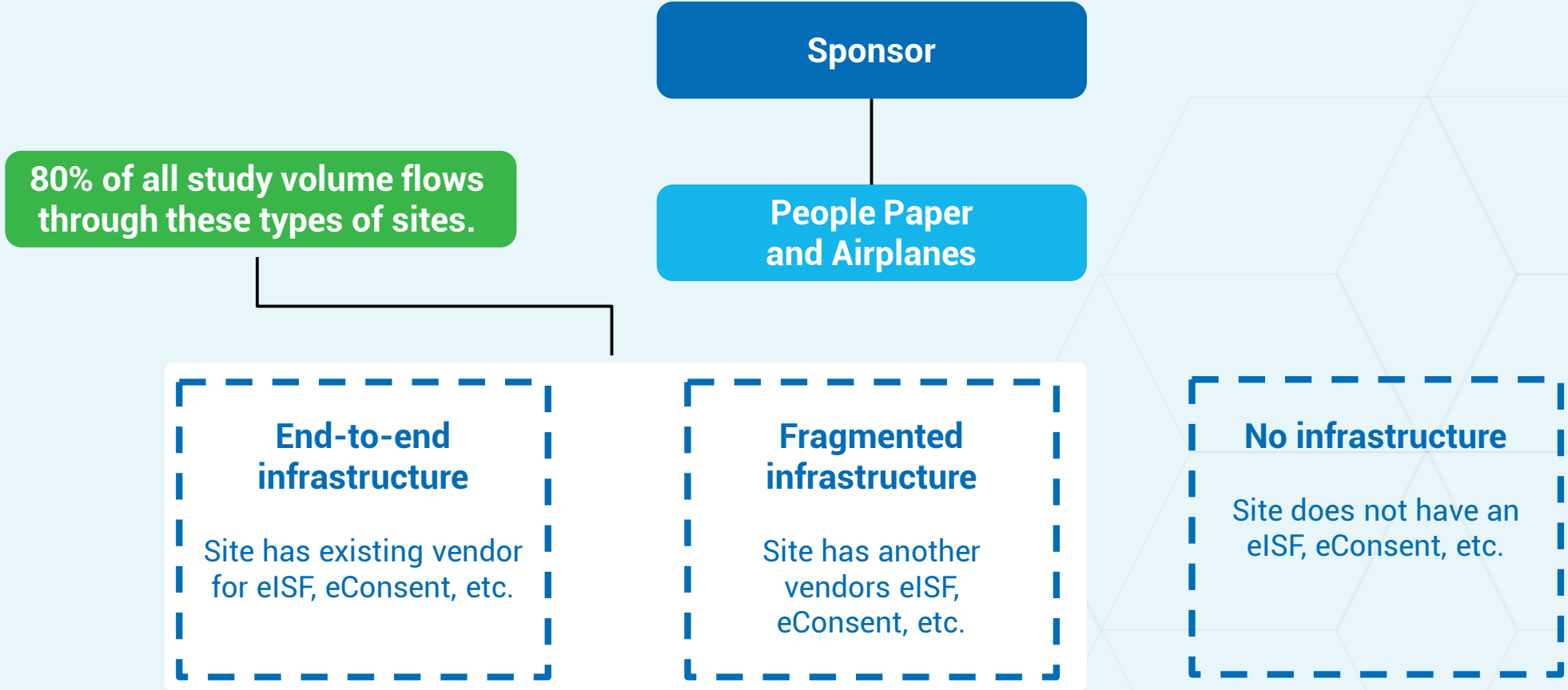
The unintended consequences of this new reality

- Inconsistencies, GCP risk rise at both core and frontier sites
- Monitoring model can't support more sites with fewer patients
- But the truth is... *Sponsors who don't figure this out will be passed over for those who do.*

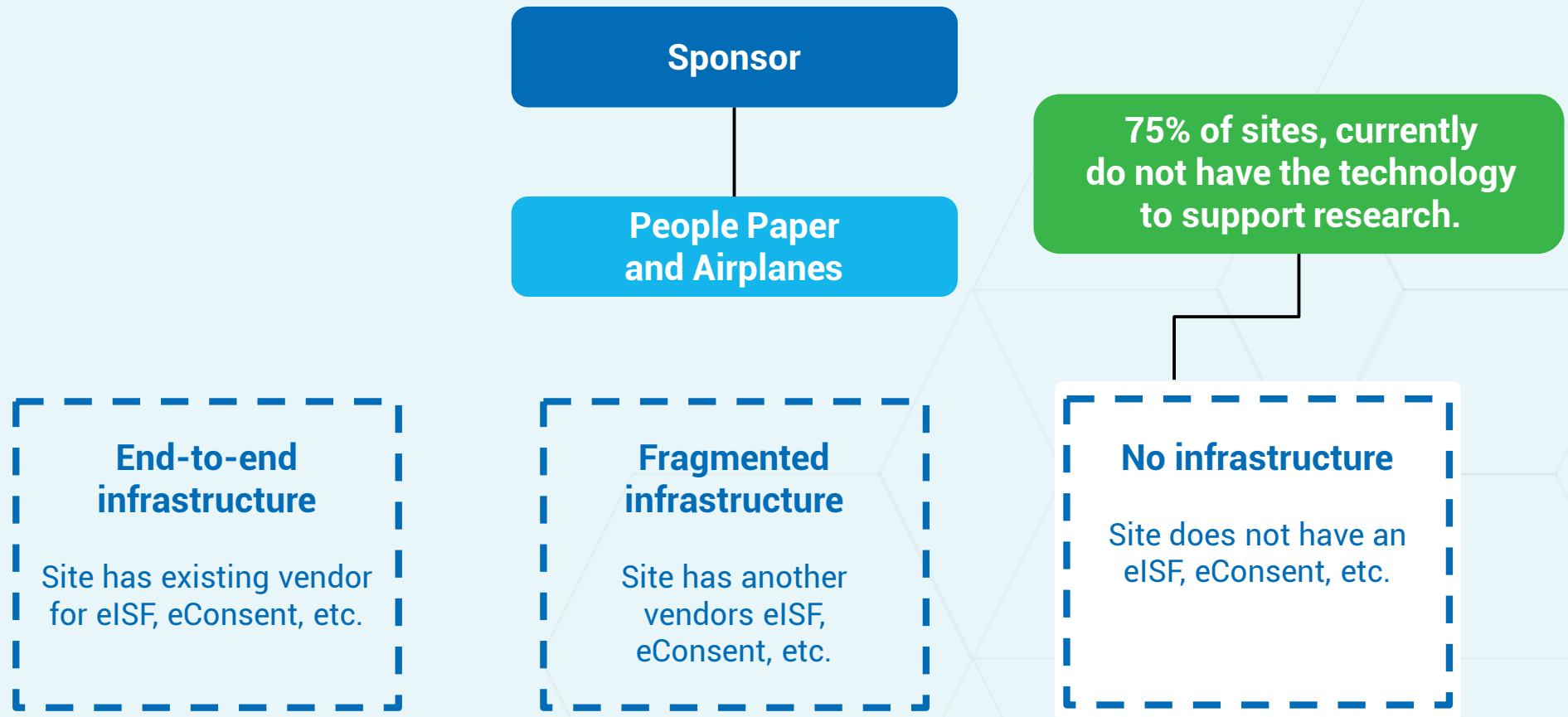
What did the the technology landscape look like in 2022?



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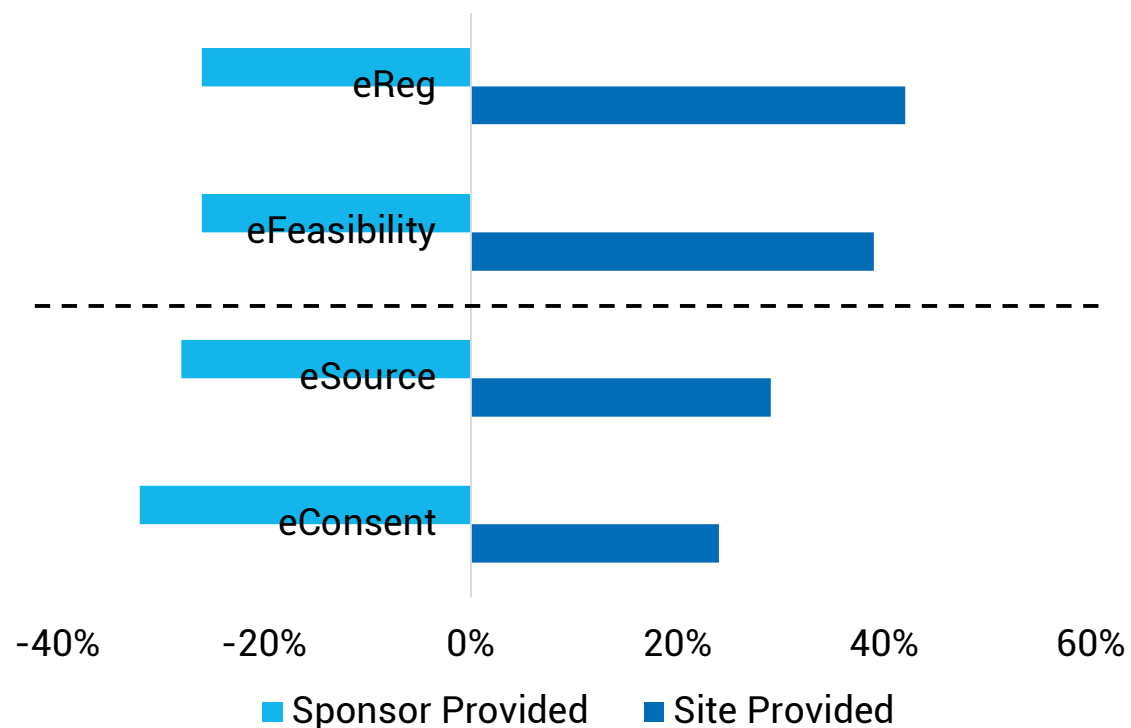


What did the the technology landscape look like in 2022?

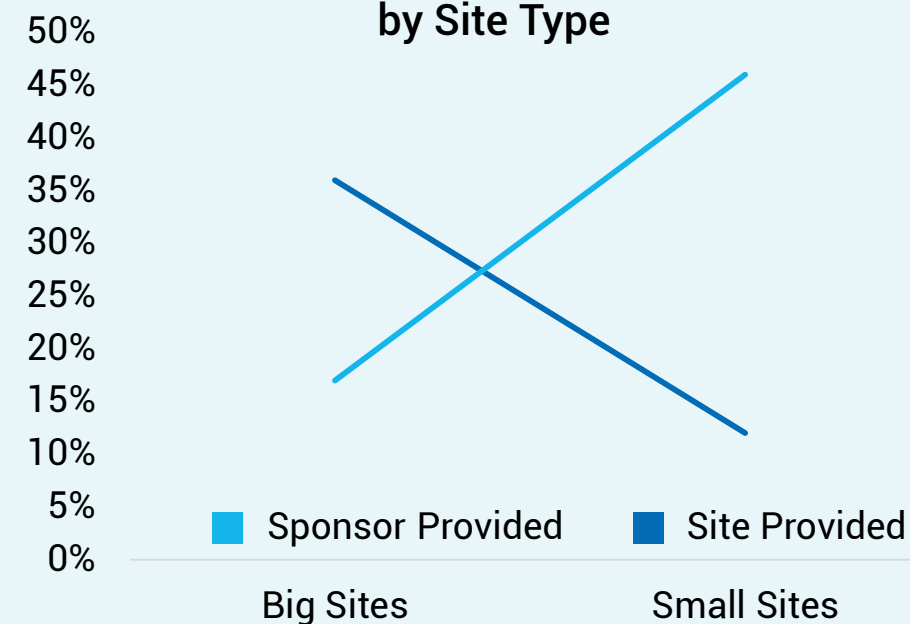


Big sites call the shots in most tech areas.
Small sites are blocked from patient-facing tech.

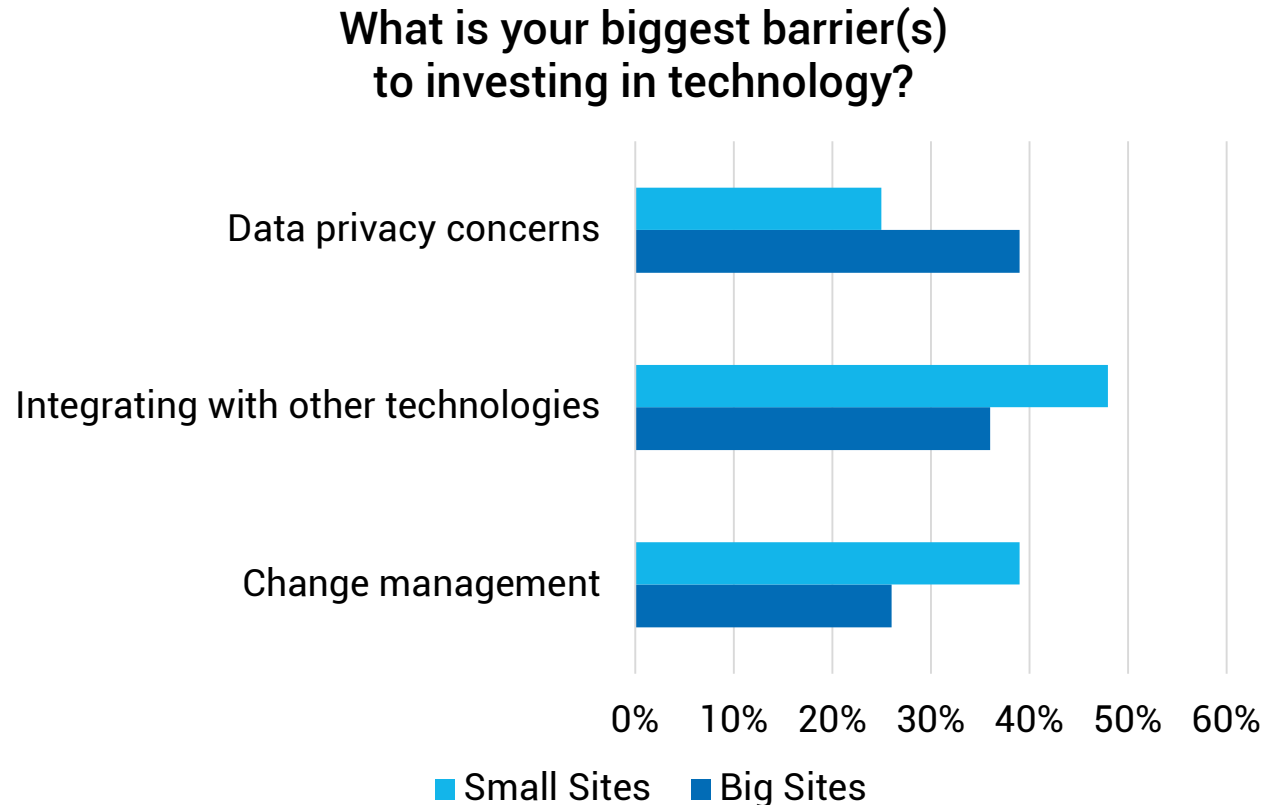
Sponsor vs. Site Provided Workflow Tools



eConsent Management by Site Type



Let's look a little deeper, what are the barriers to site tech adoption?



1 Big orgs feel the 2022 the **data privacy freak-out**

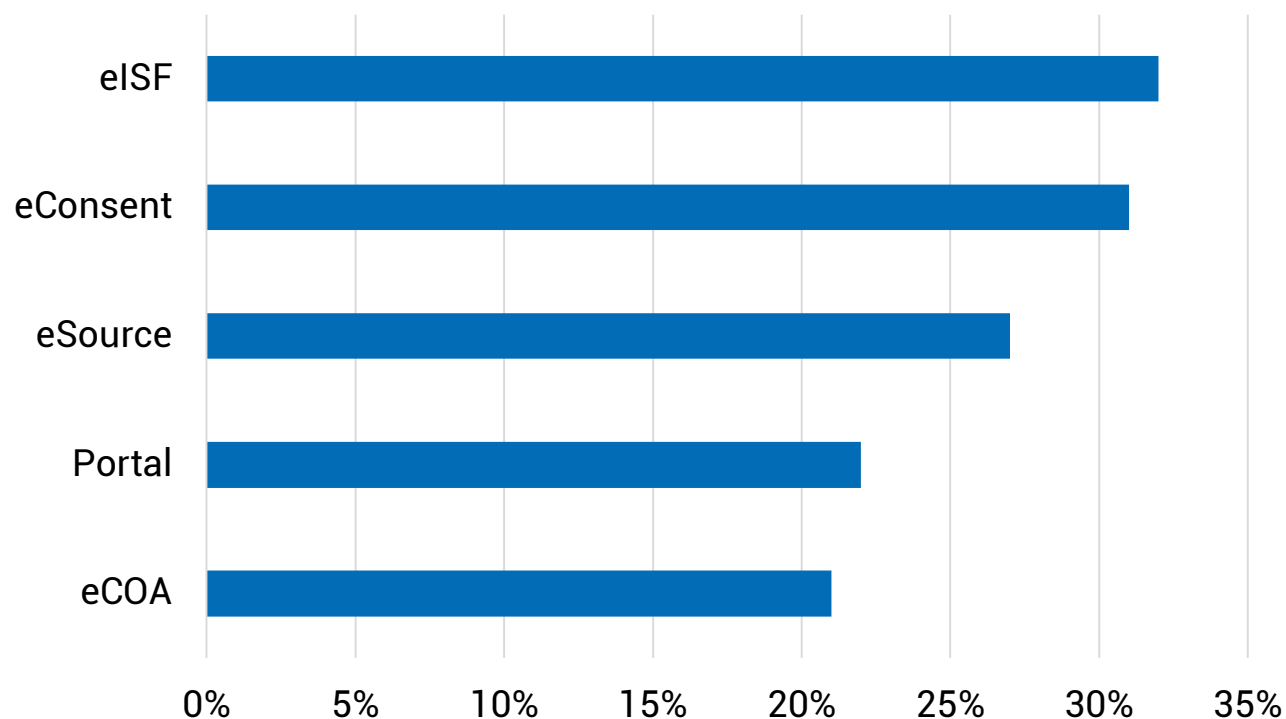
2 Integration woes affects **sites of all sizes**

3 Small sites **lack buffer in budget or staff** to manage change

Sponsors are starting to get it: For the first time ever, site tech leads sponsor plans



Plans to Adopt Digital Trial Technologies
Among Sponsors and CROs



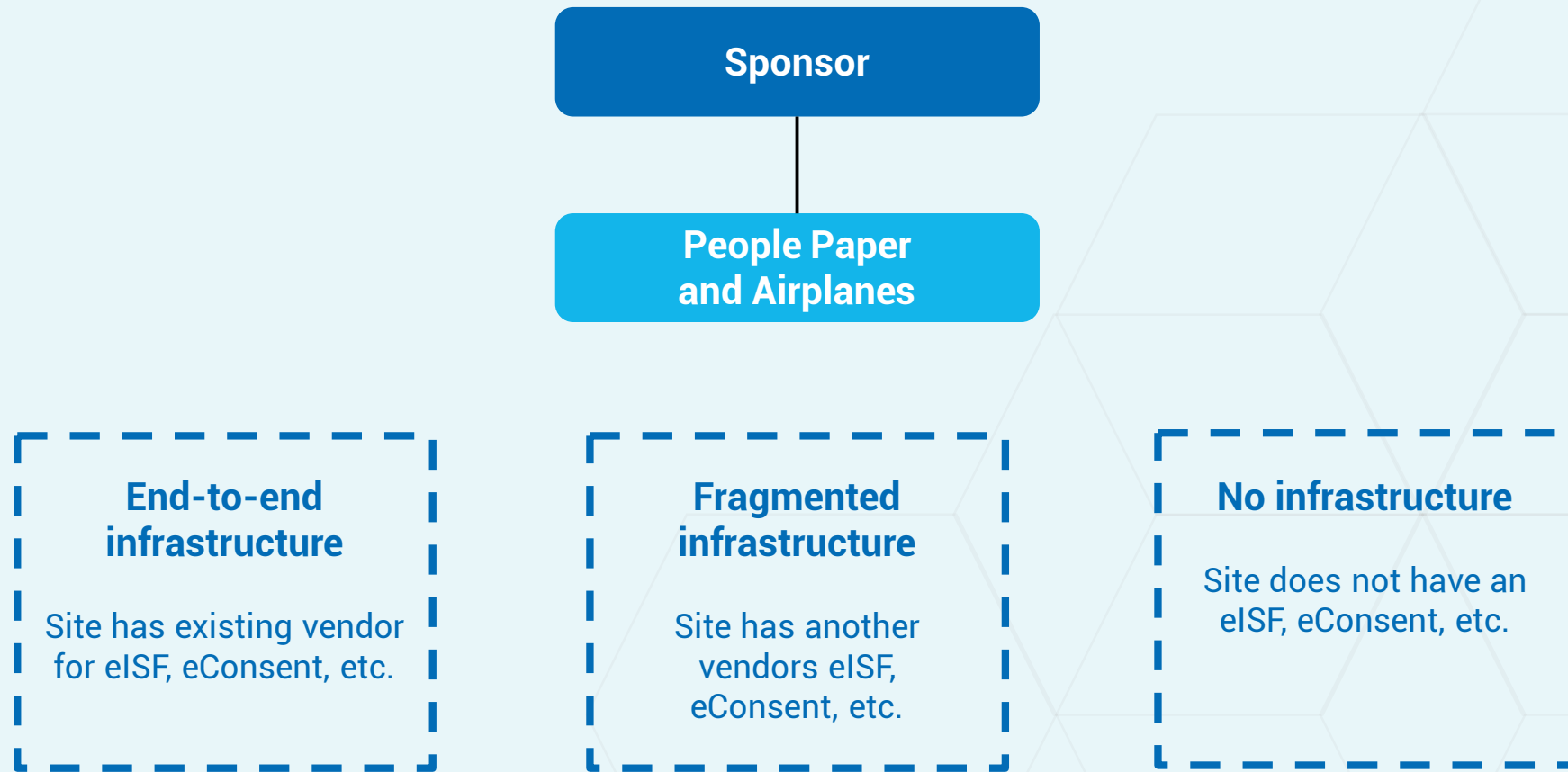
1 While it grinds my gears to cite a competitor's data, the **trend is compelling**

2 eISF as **most mature**

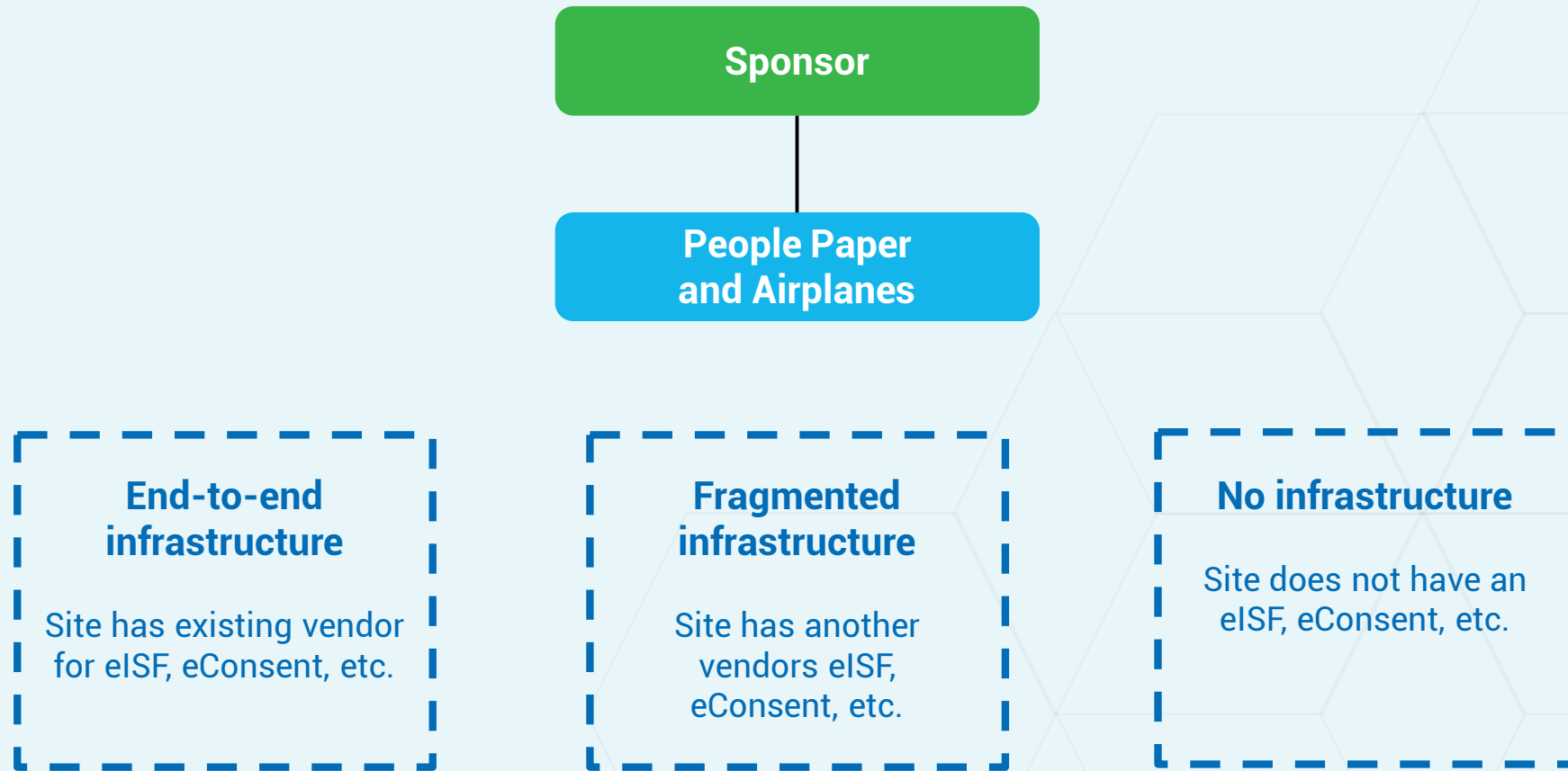
3 Patient-facing apps **rising fast**

4 Only **30%** of sponsors have dedicated budget for site technology enablement

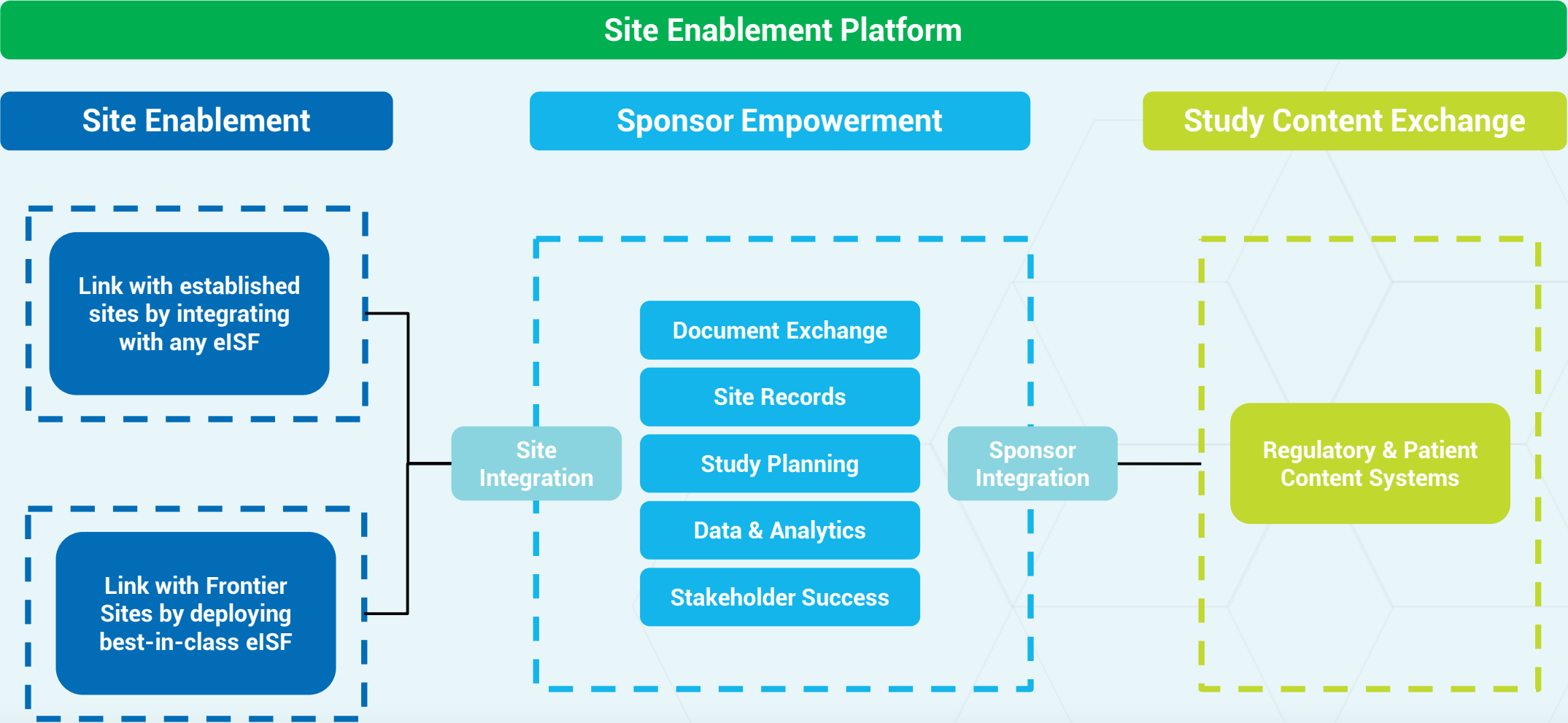
Where do we go from here?



Where do we go from here?



Where do we go from here?



What else will we see? Predictions for 2023.

1

Consolidation of
point solutions
through acquisition

2

Consolidation of
point solutions
through integration

3

A pivot to **site first technology** because
sponsors now have the
budget, and a slowdown
in study starts gives sites
the bandwidth (maybe)

Polling Question #4

Join Us for our 2023 Trends & Insights Webinar in Early 2023



Date: TBA

Topic: 2023 Trends & Insights

WCG MISSION

We accelerate the development of new medical therapies by improving the conduct and quality of clinical trials. We do this through our industry-wide platform that connects all stakeholders in the clinical trial process, and by expanding access and awareness for clinical trials to all health care providers and their patients.

Thank You!

WCG

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