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# 2024 Biopharmaceutical Sponsor Interaction with Clinical Site Networks

February 2024

Syndicated Pulse Report

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## About the Author



Life Science Strategy Group, LLC (LSSG) report authors draw upon extensive business, consulting and life science experience and backgrounds.

### **Jon Meyer, MSc, MBA**

Mr. Meyer is a Founder and Managing Member with the Life Science Strategy Group, LLC (LSSG). Mr. Meyer leads LSSG's biopharmaceutical services consulting division which serves the leading global contract research organizations (CROs), contract drug manufacturing organizations, drug discovery and diagnostics companies globally across all phases of the biopharmaceutical discovery, development and commercialization lifecycle.

Mr. Meyer has managed consulting engagements in a variety of areas including strategic planning, opportunity assessments, pricing analyses, forecasting, brand awareness and equity assessments, competitive benchmarking, positioning and messaging strategy and clinical trial benchmarking and analysis.

Prior to LSSG, Mr. Meyer was a Director in the Life Sciences Division at Navigant Consulting, Inc. and conducted preclinical drug development in the department of inflammatory disease at Roche Bioscience. Mr. Meyer holds Masters Degrees in Biomedical Science and Business Administration.

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# Study Background

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## Study Background

*The biopharmaceutical clinical development landscape is dynamic and continually evolving. While global CROs service much of the biopharma industry's clinical development needs, Clinical Site Networks are playing an increasingly important role in helping biopharma sponsors and CROs reach their clinical trial objectives.*

*In this short report, which draws on perspectives of 63 North American and European biopharma industry professionals, Life Science Strategy Group looks at how biopharma sponsors are interacting with clinical site networks today as well as their expectations over the next 1-2 years. LSSG also explores how biopharma sponsors' outsourcing dollars are being spent across their external partners including CROs, Site Networks and Academia. Finally, LSSG identifies the benefits of sponsors partnering directly with Clinical Site Networks, vs. accessing them through a CRO partner.*

*Life Science Strategy Group also provides commentary and interpretation of the data, which reflects more than 30 years of experience consulting to many of the leading global biopharmaceutical companies, clinical development CROs, and CRO industry analysts.*

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# Detailed Findings

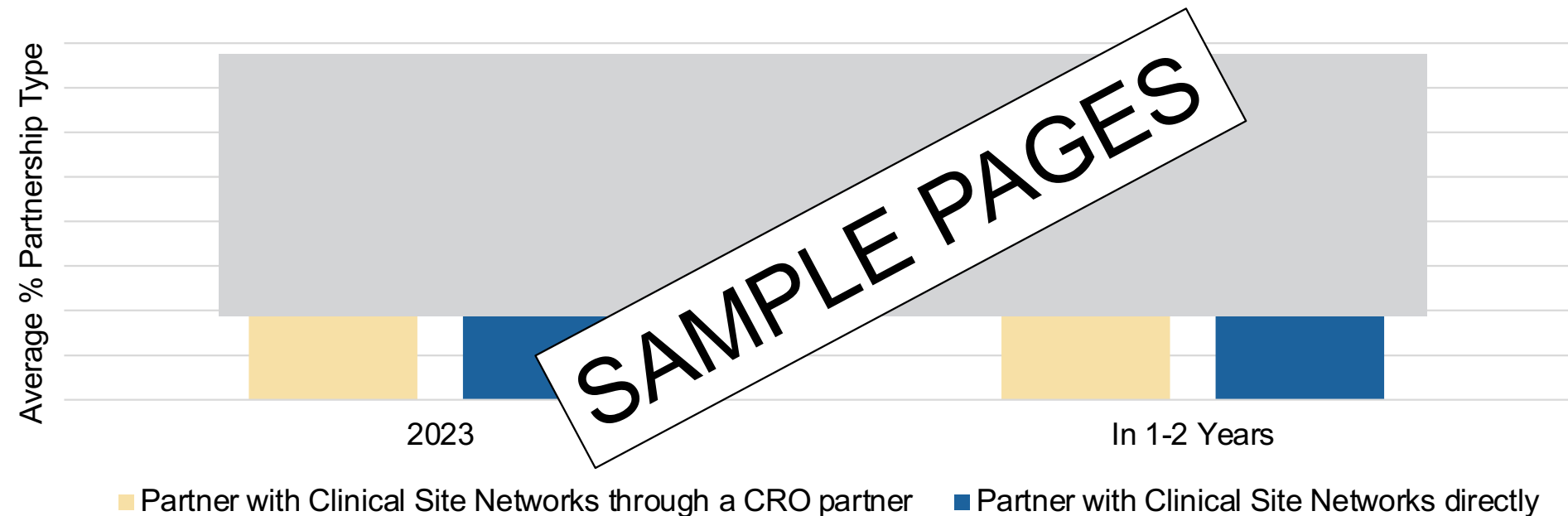
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While sponsors spend X interacting with clinical site networks through a CRO, over the next 1-2 years they expect Y.

### Sponsor Direct vs. Indirect Partnership with Clinical Site Networks – (Aggregate)

(2023 vs. Next 1-2 Years)



n=56

**Clinical site networks are X as they anticipate Y.**

Q2. What percent of the time do you partner with Clinical Site Networks directly vs. accessing them through a CRO partner (indirectly) to support your clinical trials? How will your use change over the next 1-2 years?

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Benefits of partnering directly with clinical site networks include X, Y and Z.

**Top Benefits of Partnering Directly with Clinical Site Networks**

| Benefits                                  | # of Mentions (N = 63) |
|---|------------------------|
| [Redacted]                                | 20                     |
| [Redacted]                                | 15                     |
| [Redacted]                                | 13                     |
| [Redacted]                                | 12                     |
| [Redacted]                                | 11                     |
| [Redacted]                                | 9                      |
| Better insight into issues/challenges     |                        |
| Increased quality/effectiveness of result |                        |
| Access to other CRO's resources           |                        |

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*“Sponsors have X and Y and communication with the sites. Direct partnerships can potentially Z. Without the A, the sponsor may avoid B and C. C allows for building D with site staff and investigators.”*  
 - VP, Mid-Size Biopharma, EU

*“X and Y, may be able to Cr going through the Z.”*  
 - Senior Director, Biopharma, NA

*“More X, Y and Z for A collaboration.”*  
 -Senior Director/ Director, Mid-Size Biopharma, EU

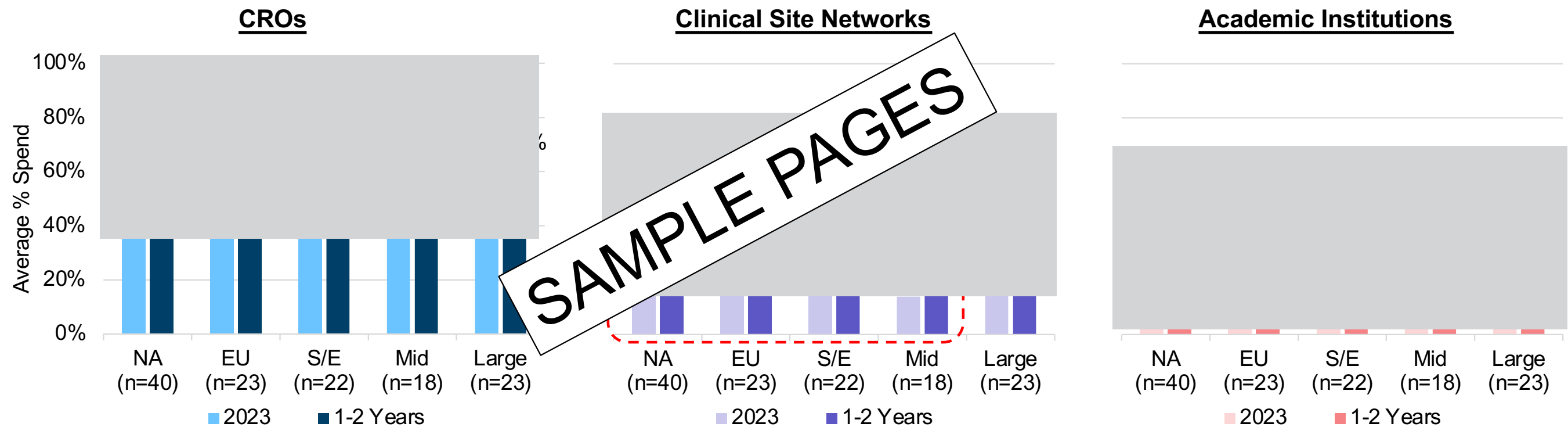
**Clinical site networks are become X and Y.**



Early signs of X and Y next 1-2 years are Z market segments, except for B, lending credibility to Z.

**% Spend for Outsourced Clinical Development per Provider Type – (Segmentation)**

*(2023 Spend vs. Spend in 1-2 years)*



***While it is X and Y, outsourcing patterns observed across market segments Z.***

Q1. Thinking of your/your company's annual outsourced clinical development spend, what percent was spent directly with each of the following providers in 2023? What are your expectations of spend in the next 1-2 years?

# Respondent Demographics

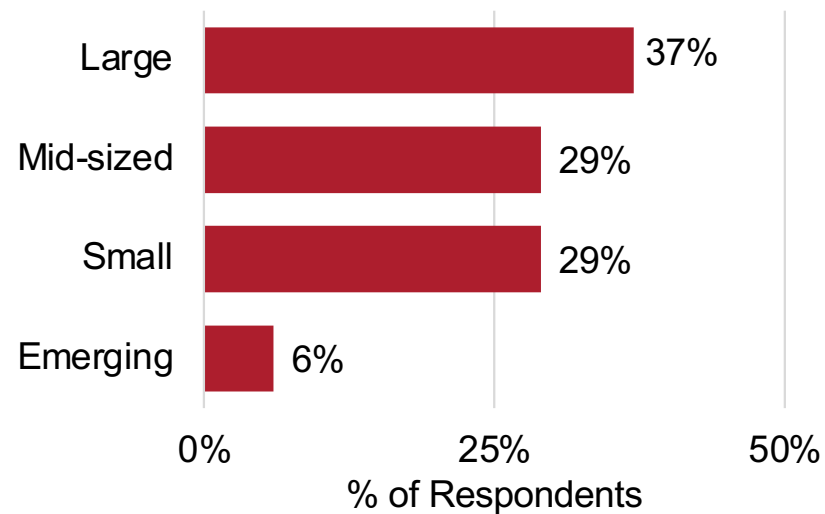
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# Respondent Demographics

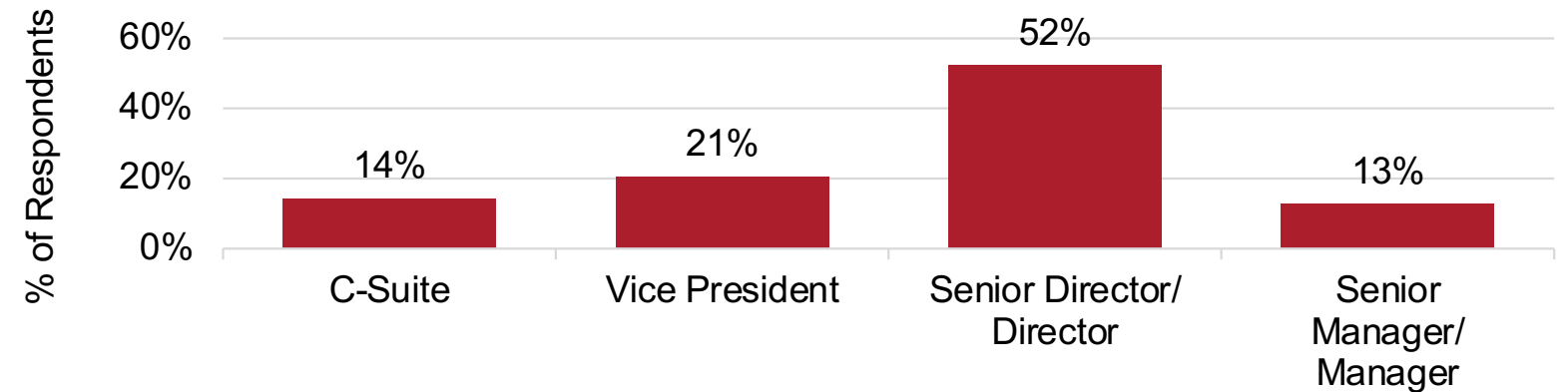
- All respondents work for a biopharmaceutical company in North America (63%) or Europe (37%).
- All respondents have clinical development functional responsibilities.
- All respondents currently outsource some or all of their clinical development activities to CROs, Clinical Site Networks or other external providers.

**Company Size**

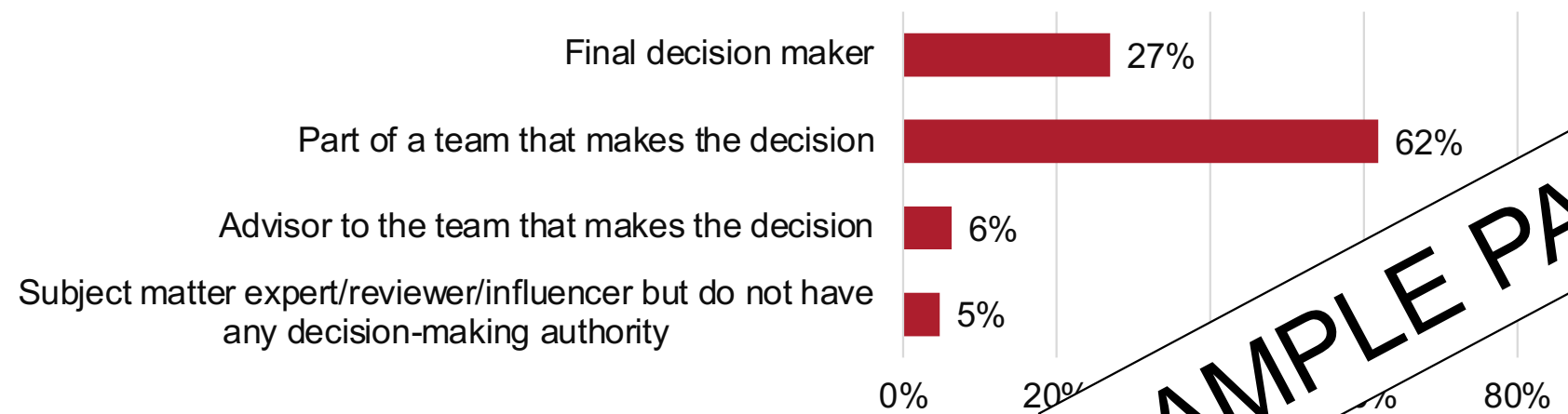


- Large: More than 10,000 employees
- Mid: 300 to 10,000 employees
- Small: 30 to 300 employees
- Emerging: Up to 30 employees; no commercial products

**Position Level**



**Decision Making Role**



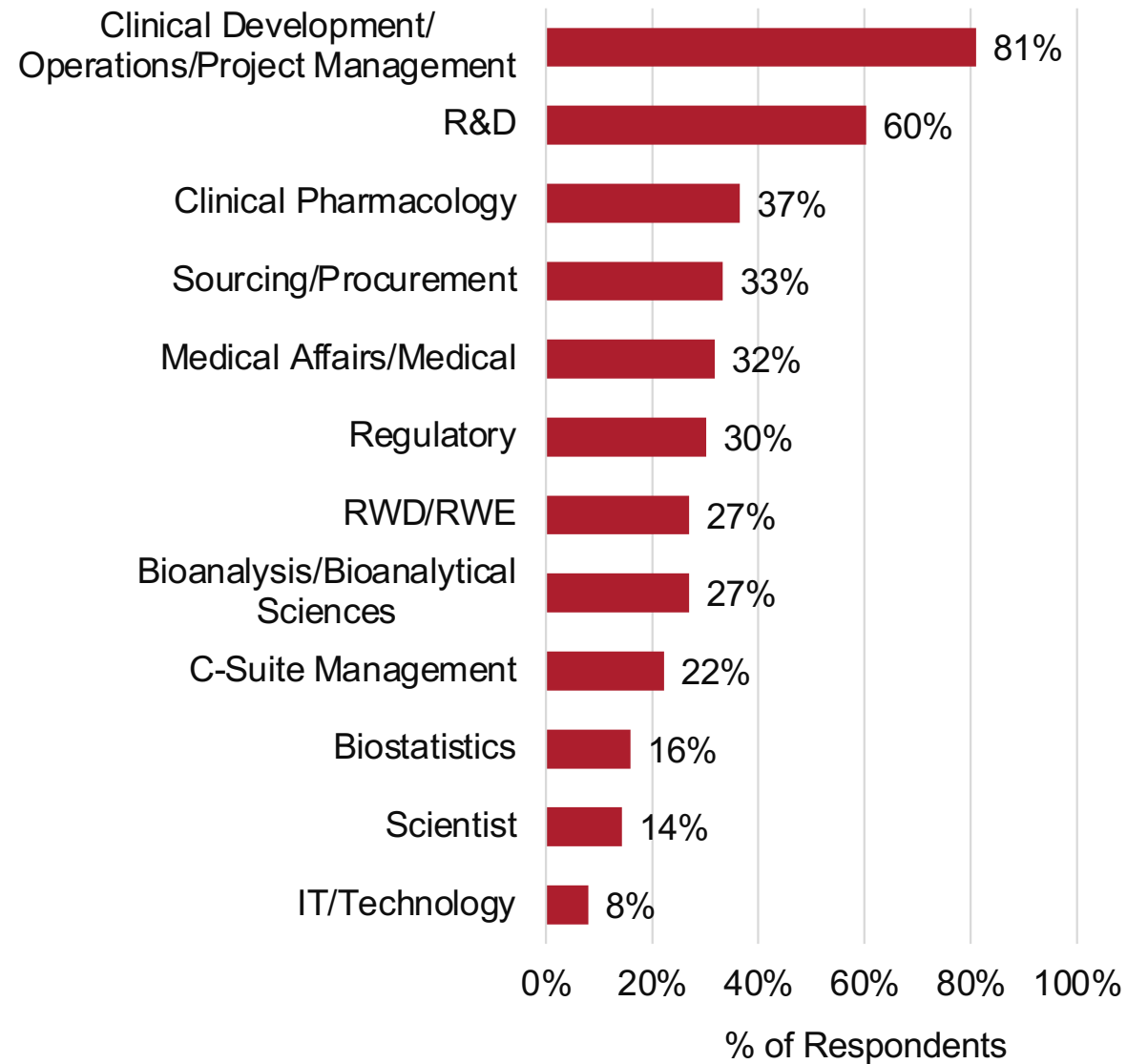
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- S1. Where are you located?
- S2. What best describes the type of company you work for?
- S3. What is your company's total headcount?
- S4. What best describes your position level or equivalent?
- S5. Which best describes the developmental stage of your functional responsibilities at your company? Please select one.
- S8. Which of the following best describes your role in the clinical trial site selection process for your/your company's clinical trials?
- S9. Does your company currently outsource any of its clinical development activities to CROs, Clinical Site Networks or other external providers?

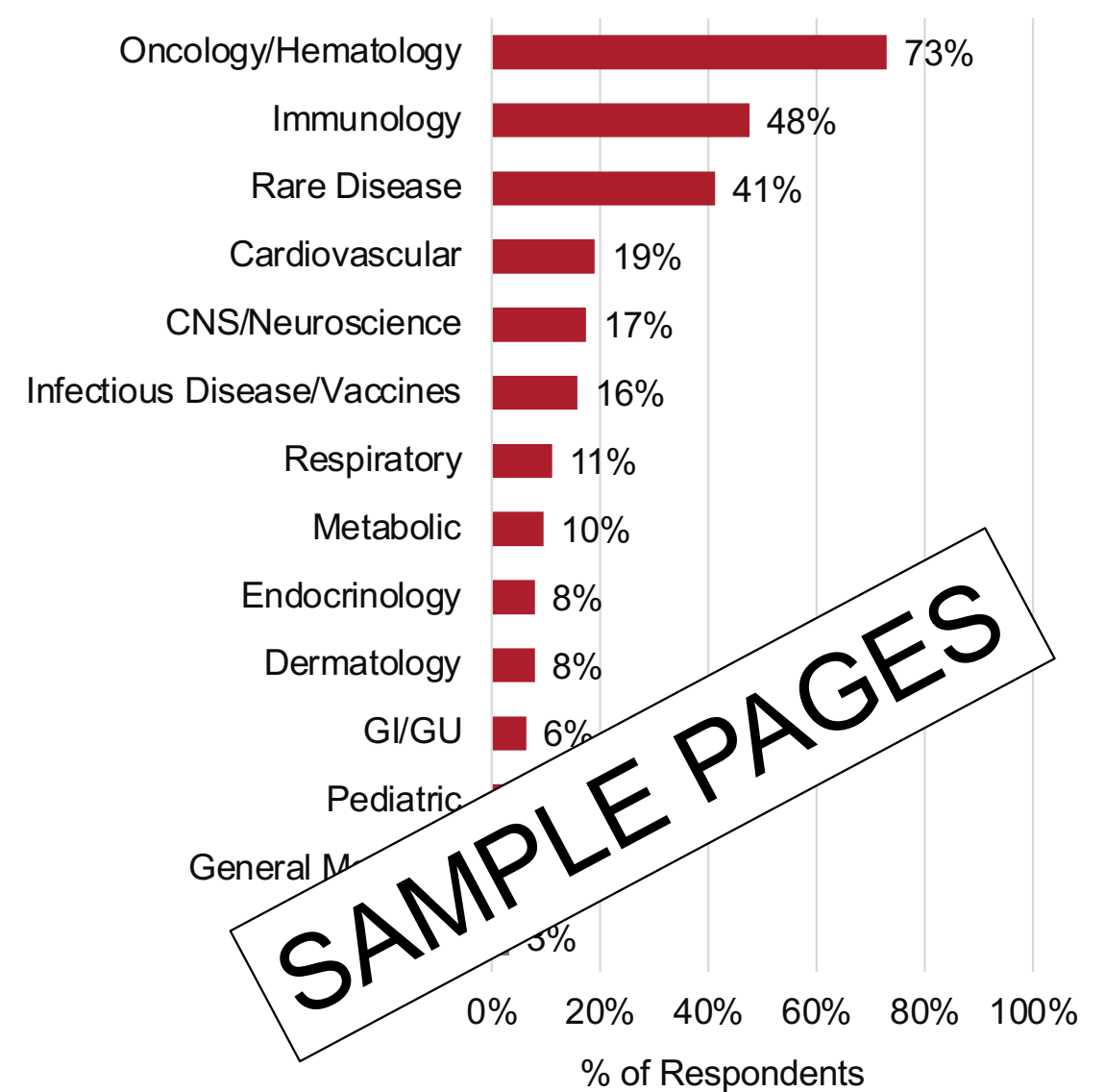
N=63

# Respondent Demographics

## Primary Functional Roles



## Top Therapeutic Areas



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S6. Which best describes your primary functional role(s) at your company? Please select all that apply.

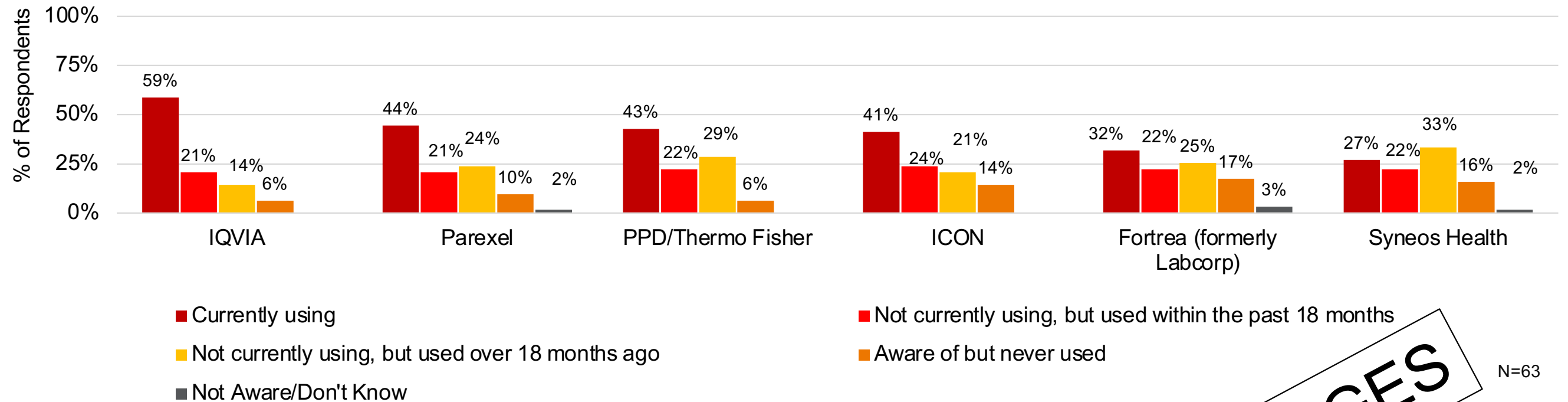
S7. What are the top-3 therapeutic area(s) you work within or are you responsible for? Please select up to 3 areas.

\*Other includes: Ophthalmology, Gene Therapy

N=63

# Respondent Demographics

## Clinical Development Vendor Experience/Awareness



\*Other CROs include: WCT (n=3), A... (n=2), Novotech (n=2), Altasciences, BioAgilytix, WuXi, Biorasi, CTL... (n=2), and... for Medicine, Clario

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N=63

S10. What best describes your experience/familiarity with each of the following CROs offering clinical development services? Please complete for all vendors.