2024 Site Landscape Survey

SCRS
Society for Clinical Research Sites

Our Voice
Our Community
Your Success

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Introduction

Since 2006, the Society for Clinical Research Sites (SCRS) has conducted annual surveys that aim to gauge the health and evolution of clinical research from the site perspective. The SCRS Site Landscape Survey serves as a useful barometer of the state of the industry by gathering comprehensive data about site operations, finances, technology adoption, and relationships with sponsors, among other timely topics.

The data provides a useful benchmark for sites, offering concrete information they can use to adapt, lead, and thrive in an increasingly complex clinical trial landscape. For sponsors, CROs, and service providers, it sheds light on the challenges and priorities that sites face.

This report is an aggregate of Landscape Surveys conducted throughout the year which focused on various topics. In 2024, we explored major themes like technology integration, site financial health, diversity and inclusion, and record retention—areas that reflect the evolving priorities and challenges of clinical research sites. Additionally, the surveys dived deeper into financial sustainability, workforce trends, and collaboration across the clinical research ecosystem.

This year's survey includes responses primarily from sites, with additional representation from CROs, sponsors and service providers. The respondent pool reflects diverse perspectives with global collaborators contributing insights from leading clinical research regions. More than 1,000 global clinical research sites, sponsors, CROs, and technology providers shared their input on these topics, identifying wins, challenges, and further opportunities to streamline clinical trial operations and enable site success.

Site Demographics

The Global Landscape survey reflected a diverse range of site types, underscoring the breadth of clinical trial landscapes. Freestanding or dedicated research facilities account for the largest share (25%), followed by private practices and medical groups conducting trials (24%). Hospitals, health systems, and VA sites represent 21%, with academic centers or universities making up 13%. Privately owned research centers or SMO-type networks contribute 11%, and nonprofit research institutions round out the group at 7%.

Geographically, respondents represent a global perspective. Most responses came from North and South America and Europe, with additional contributions from Oceania, Africa, and Asia.

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Financial Health & Operational Sustainability

Continuing a theme prevalent in prior years' surveys, clinical research sites today face mounting financial pressures that threaten their operational sustainability, particularly as technology becomes increasingly central to trial execution.

Site Finances at a Glance

50%
have 3 months or less of operating capital in the bank

30%
reported lower operating capital year over year

30%
have more than a third of their A/R more than 90 days past due

32%
recorded a net profit of less than 10%

Profit Margins: This year's data reflects ongoing financial challenges for clinical trial sites, with many reporting limited operating capital and slim profit margins. About 30% of sites have seen declines in cash reserves, while roughly half are able to maintain only three months or less of operating capital.

Payment Schedules: 72% of sites prefer monthly payment schedules, yet only 38% receive them. This is largely in part due to nearly half (47%) of sponsors preferring quarterly payments. Additionally, payment delays are common, with nearly one-third of accounts receivable overdue by 90 days or more, putting additional strain on site cash flow and operational stability.

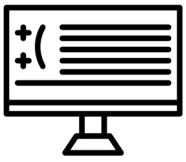
Screen Failures: Most sites negotiate for better screen fail terms when insufficient, however only 6% of sites said the final contract covered the actual number of screen fails.

Note: Some screen failures occur as a result of sponsor-provided technologies, yet they count against sites' allowed failures, effectively penalizing sites for issues outside their control. SCRS recommends that sponsors eliminate this practice by changing any formal contract language and/or accommodating sites' requested terms for screen fails.

Top Underfunded Areas in Trial Budgets



38%
Prescreening



36%
Screen Failures



30%
Training & Education



29%
Startup Costs

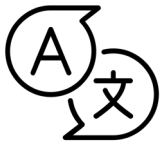


23%
Study Cancellation

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Rarely Received Study Costs

Sites that **never** receive these costs in study budget



62%
Translation / Interpretation



36%
Cancelled Protocol



30%
Technology-related



29%
Unexpected (misc.) Cost Allotment Fund



23%
Training

Improving Trends

Withholding: Withholding payments have moved in the right direction, with 27% of sites reporting they negotiated 0% withholding in contracts. The number of sites reporting 0% holdbacks has nearly doubled since 2022. However, this outdated practice should be eliminated altogether.

Workforce Retention: The workforce challenges at the site level we saw last year seem to be leveling out slowly. In 2024, 80% of sites grew their workforce. When employees do leave, it's, driven by factors such as competitive job offers from sponsors or CROs (46%), inadequate pay (29%), and a lack of professional development opportunities (17%).

Many sites have implemented employee retention strategies such as flexible hours and work arrangements, training and development opportunities, and performance and retention bonuses, enhanced compensation and career growth initiatives to stabilize their workforce.

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Technology & Innovation

Clinical research sites face multiple challenges when participating in technology-enabled trials, with financial barriers and technology integration emerging as primary concerns.

To address these challenges, the SCRS West: Clinical Tech and Innovation Summit held annually in June presented strategies to reduce site burden and enhance tech integration.

The Technology Landscape Survey highlights mixed adoption patterns for emerging technologies in clinical trials. In 2024, systems like eTMF/eRegulatory, ePro/eDiaries, and eSource dominate site operations, with the majority of sites reporting using these tools.

Technology & Remote Services Used at Sites in 2023

80% eTMF / eReg

79% ePRO / eDiary

74% eSource

49% eConsent

44% Virtual visits / telemedicine

43% Connected devices or sensors

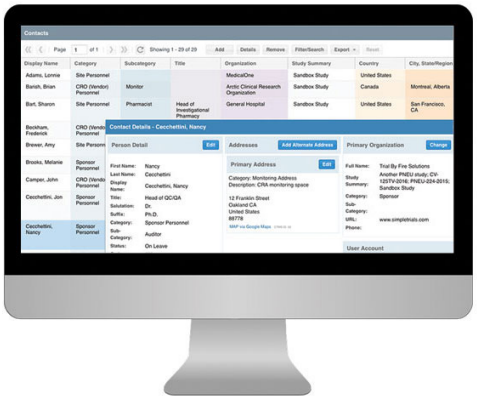
38% Patient engagement

36% Direct-to-patient IP shipment

Site-Owned Technology Adoption

Sites must be able to bring consistency and scalability to their operations. The ability to use the same technology across multiple studies can significantly reduce costs and improve quality. Increasingly, sites are purchasing their own technologies, with CTMS, eTMF/eReg, and eSource dominating as site-owned platforms. However, nearly 30% of sites cite cost and integration challenges as primary barriers to purchasing their own technologies.

Top Technologies Already Purchased Independently by Sites



89% CTMS

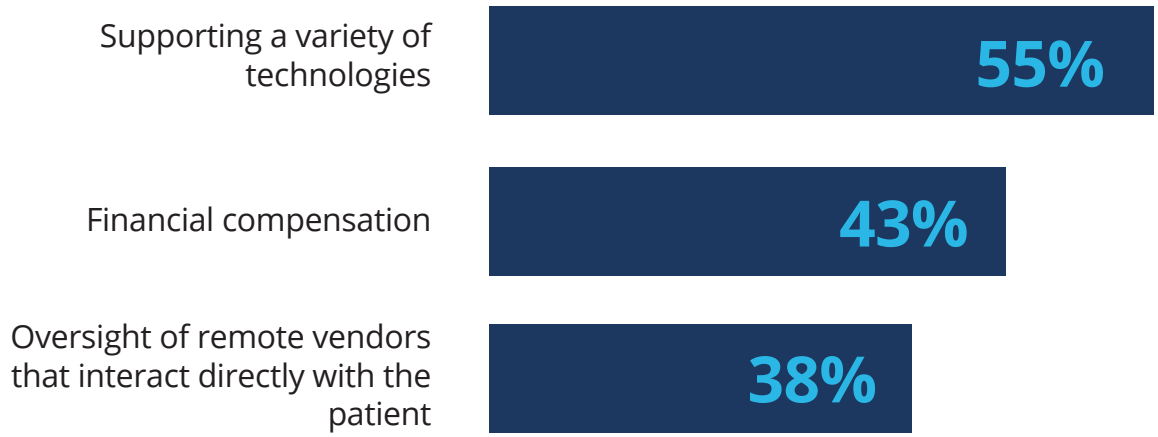
83% eTMF / eReg

75% eSource

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Site Technology Challenges

Biggest Site Challenges When Participating in Technology-Enabled Trials



- **Financial Compensation:** Nearly half of respondents (43%) cite financial compensation as a significant barrier, particularly when it comes to covering fees for implementing, managing, testing, and supporting sponsor-required technologies. Additionally, 28% of sites hesitate to adopt their own technology due to costs.

  Sites highlighted the financial strain associated with adopting and maintaining technology for trials, with nearly half citing financial barriers as a significant challenge to technology-enabled trials. As sites integrate tools like eTMF and connected devices, they face new expenses for implementation, maintenance, and troubleshooting.

- **Technology Overload:** Over half of the respondents (55%) report difficulties managing a wide variety of sponsor-required technologies, leading to operational inefficiencies and added complexity.

- **Oversight:** Oversight of remote vendors (38%) further compounds the challenge, as sites struggle to ensure seamless workflows while safeguarding participant data and experience.

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Site Needs for Technology-Enabled Trials

More Robust Budgets: More than two-thirds (67.4%) of sites identified stronger budgets as their most pressing need for manage technology-enabled trials. With more technology being utilized in trials than ever before, sites are often significantly underpaid for required training, troubleshooting, technical support and other operational costs to run various technologies.

What Support Sites Want & Need for Technology-Enabled Trials

67% Stronger & more robust budgets

55% More effective site technical support

53% Integrated & consistent technology

Providing more robust budgets will provide sites with necessary reimbursement to account for unanticipated costs related to technology implementation, management and maintenance. For example, sites are often required to keep study records electronically long after their regulatory requirements have lapsed. Yet 65% of sites, sponsors and CROs said current budgets offered are not sufficient to cover long-term electronic record archiving requests. Budgets should account for all technology-related expenses, including training, implementation, and ongoing support, to ensure seamless adoption and reduce financial strain.

Sponsors, CROs and technology vendors can support sites by providing:



Standardized Budgets: Sponsors and CROs can offer standardized technology-related budget items like integration fees and quality checks, which would lessen case-by-case negotiations. It is recommended that sponsors and CROs build standard technology-related invoiceables into budget grids and eliminate the need to ask for justification each time.



Integrated and Consistent Technology: More than a third (37.8%) of respondents listed integrated and consistent technology as their top priority. Disconnected systems or varying technology requirements across sponsors create inefficiencies and complicate workflows. Streamlined, interoperable platforms could significantly reduce the burden on sites, especially with duplicate data entry. Sponsors and CROs can also standardize platforms used consistently so sites have less to manage.



Efficient Training: The industry recognizes that more effective and efficient training is needed for sites. On average, each role within a site spends around six hours per month on training per trial, with coordinators often spending even more time.

DID YOU KNOW?

SCRS is advocating for a 25% reduction in required site training hours by the end of 2025.

Training should be "right-sized" to eliminate unnecessary duplication and focus on what is truly essential. SCRS also advocated for "training reciprocity" policies, where previously completed training for similar systems counts across studies, minimizing redundant training. Role-based and just-in-time training was proposed as well, aiming

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Technical Support: Sites highlighted the need for better technical support, with 36% ranking patient support as their highest need and 15.8% ranking site technical support as their top priority. Vendors should offer technical support with live help desks, extended hours and in multiple languages to help sites navigate technology issues experienced by both patients and site staff.

As digital adoption continues to rise, addressing site concerns through better financial support, streamlined technology requirements, and comprehensive training will be critical to ensuring trial success. By addressing these specific needs, sponsors and CROs can foster stronger partnerships with sites, improve trial efficiency, and support smoother adoption of technology-enabled solutions.

The SCRS Site Invoiceables Guide outlines several technology-related costs that should be considered for today's clinical trial budgets, such as third-party integration fees, mock quality assurance visits, and fees for protocol amendments, which help reduce the need for separate negotiations.

Community Engagement

Access to clinical trials remains a high priority for sites and industry partners. With nearly 300 participants, the IncluDE Landscape Survey received insights from primarily hospital-based sites (48), followed by independent sites (27%) and clinic-based sites (16%). The majority of respondents were located in the United States (47%), Asia (25%) and Eastern Europe (14%).

Most respondents (73%) are aware of their country's diversity guidelines, though 24% feel uncertain about the specifics. Further, 70% of sites in the U.S. indicated that sponsors and CROs have not provided clear guidance on their expectations for inclusive enrollment.

Approximately one-third of sites have implemented recruitment plans aimed at underserved communities, with an additional 15% planning to do so soon. However, fewer than half of sites feel they consistently receive adequate support—financial, educational, or operational—to meet regulatory directives or sponsor-directed DEI requirements. Many point to inconsistent sponsor and CRO contributions, such as trial budget allocations and community engagement initiatives.

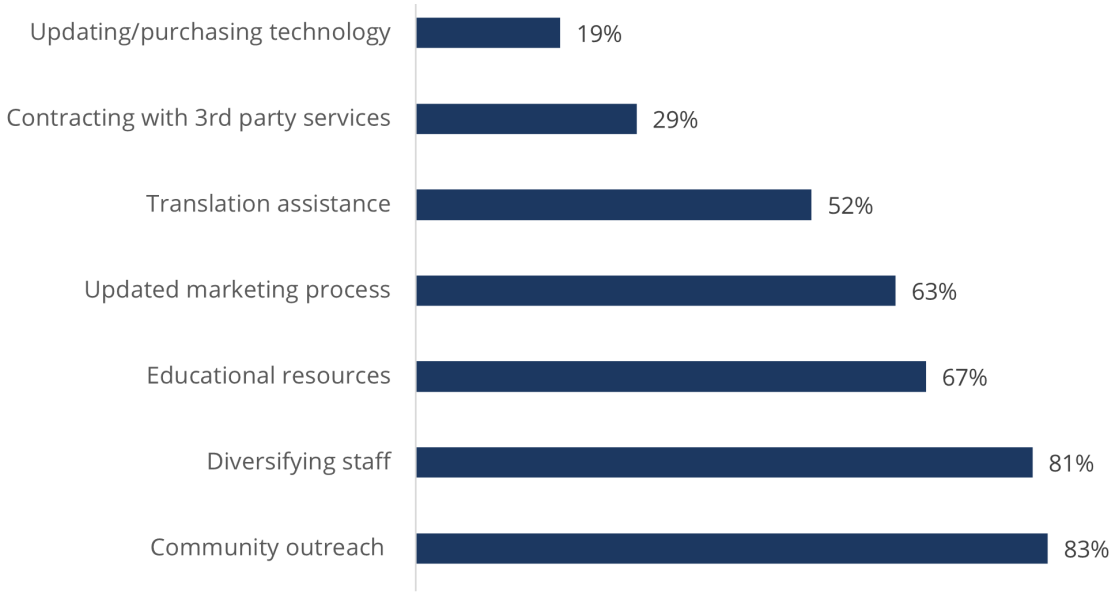
78% of sites always or often request DEI-related trial budget items, yet only 41% receive these funds. Other top requests include educational resources for patients as well as marketing support Non-trial specific community engagement support is rarely received by sites, something vital to the ongoing efforts to improve trust within underrepresented communities.

> ***"78% of sites always or often request DEI-related trial budget items, yet only 41% receive these funds."***

While over 78% of respondents feel their site adequately represents diverse populations, 22% report challenges, indicating room for improvement. This gap stems largely from a disconnect between the DEI support sites request—such as trial budget adjustments and educational resources—and the support provided by industry partners.

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What DEI-related modifications have you made or are you planning to make to your business and operations?



Trends and Opportunities for More Inclusive Research

Recruitment Technology: Technology-based solutions for recruiting new patient populations are gaining interest among sites, though adoption remains varied. Over half (55.3%) of respondents have not yet used these tools but are open to adopting them or planning to do so in the future. Among sites that have implemented such technologies, 16% report finding them helpful for enrollment efforts. Commonly used tools include feasibility reports (40.2%), EMR database surveys (38.9%), and patient matching services or software (20.8%).

Patient-Retention Tools: Regarding patient-facing tools, sites indicated that telemedicine platforms, prescreening tools, printed materials for community engagement, and ePRO have improved the overall retention of trial participants.

Preclusive Language: Only 21% of sites report that patient-facing materials do not use preclusive language. 44% of sponsors shared that all of their protocols already go through a DEI-related review, with 44% also indicating they are updating their processes to be more inclusive. Sponsors can collaborate with sites to review and refine these materials to improve trial inclusivity.

Site Selection: Inclusive enrollment capabilities are increasingly influencing site selection, with over 50% of sponsors and CROs considering diverse enrollment capacity important and more than 20% citing it as a top priority. As equitability and accessibility continues to gain emphasis in clinical research, sites with robust community engagement programs are positioned to gain a competitive edge in site selection.

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Looking Ahead

Sites, sponsors and CROs outlined their priorities for sites in 2025, which include shortening prolonged negotiation times, reducing overstatement recruitment projections during feasibility, and improving site ability to conduct tech-enabled trials.

Top 3 Areas Sites Should Improve & Address

Budgets & contracts

Shorten prolonged negotiation and execution time.

Recruitment

Overstated recruitment projections during feasibility and/or not meeting enrollment and diversity goals.

Technology

Improve knowledge of technology and ability to conduct remote visits and/or technology-enabled trials.

Site-focused solutions call for active engagement and collaboration across the industry to build a sustainable, inclusive, and technologically adept research environment. SCRS initiatives such as the IncluDE Program, Payment Initiative and Digital Innovation Initiative continue to address site challenges. Resources like the Site Invoiceables Guide and the Invoiceables Calculation Spreadsheet support sites in accurately accounting for study costs and achieving better financial stability.

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