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Latin American Site Landscape: Benchmark Your Site

November 16, 2026

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SCRS Society for Clinical Research Sites

Latin American Site Landscape: Benchmark Your Site



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Faculty Disclosure

In compliance with ACCME Guidelines, I hereby declare:

I do not have financial or other relationships with the manufacturer(s) of any commercial services(s) discussed in this educational activity.

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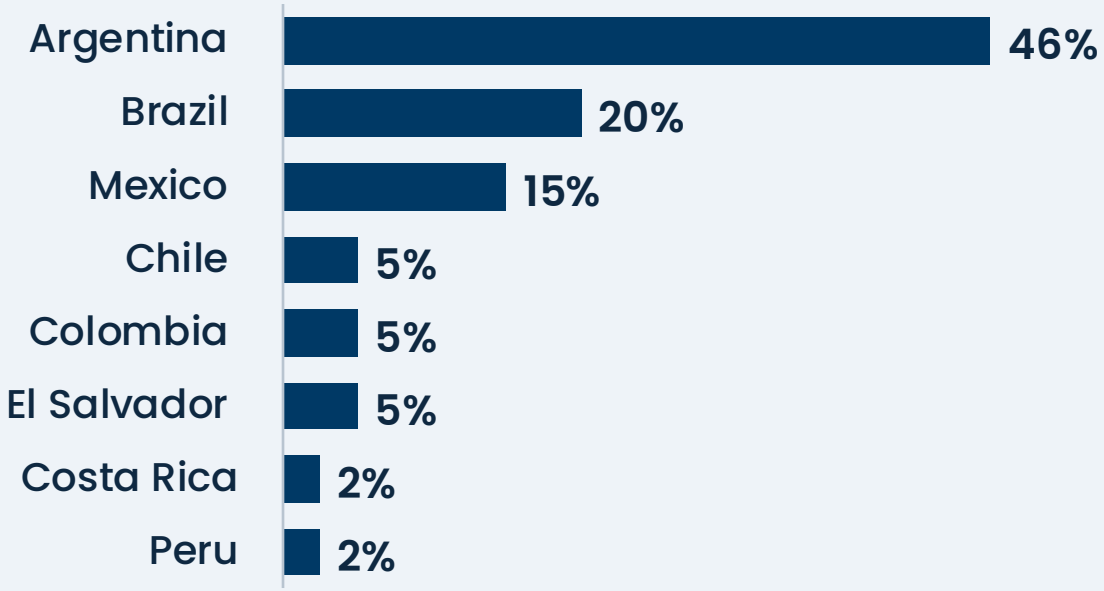


Criteria For Awarding Contact Hours

- Applicants must be present during the “live” event, contact hours are not issued for recordings.
- Applicants must attend the activity the whole time, missing no more than ten minutes of the activity.
- Applicants must complete the post-meeting survey with a score of at least 70%.
- Applicants must complete the post meeting survey evaluation questions.
- Society for Clinical Research Sites, Inc. is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center’s Commission on Accreditation.

What Makes Up LATAM

Respondents by country (% and count)



74%

Member sites

Plus 23% non-member and zero sponsor/CRO

66%

Executive Directors / Owners

vs. 39% globally

71%

Dedicated / independent sites

vs. 34% globally

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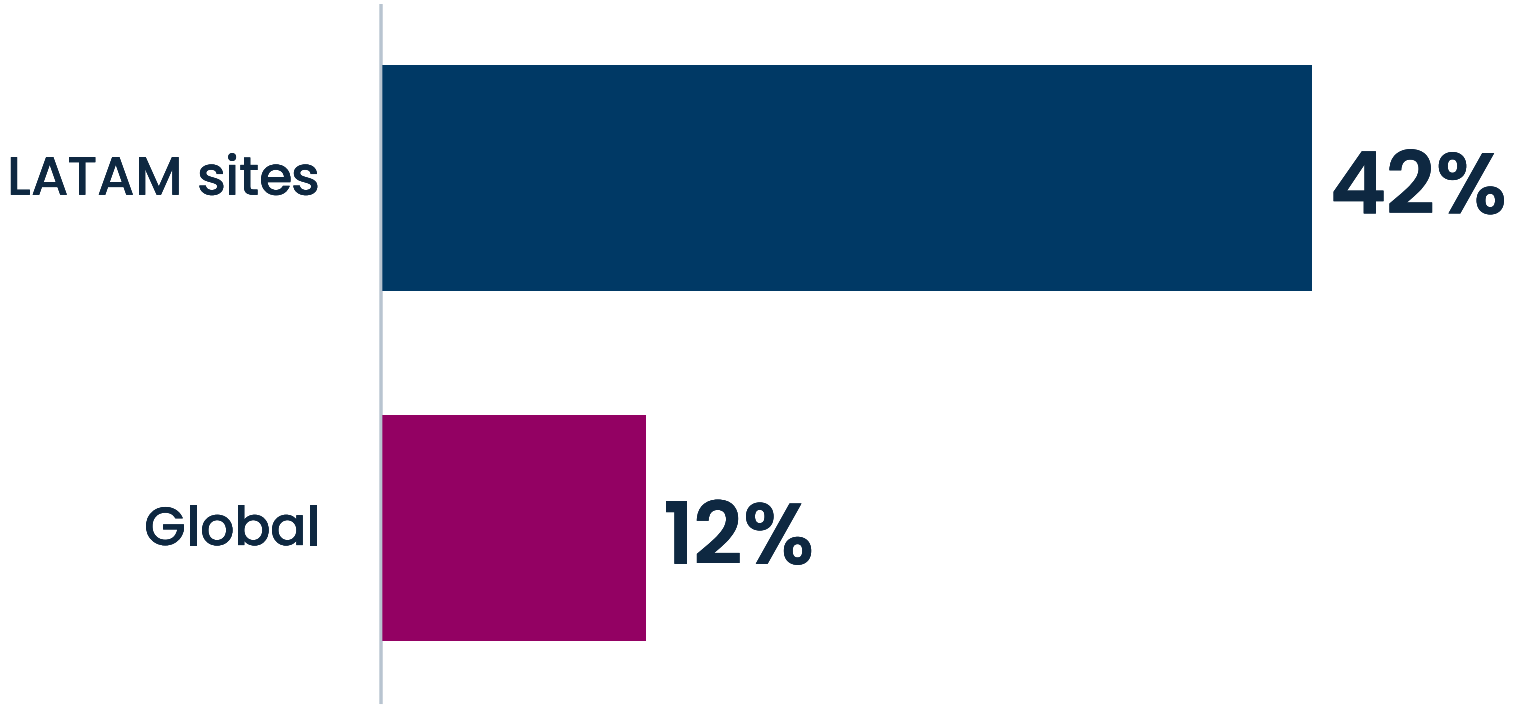
A Region in Growth

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The Headline Number

New study opportunities sent to sites increased significantly (>20%): % of sites



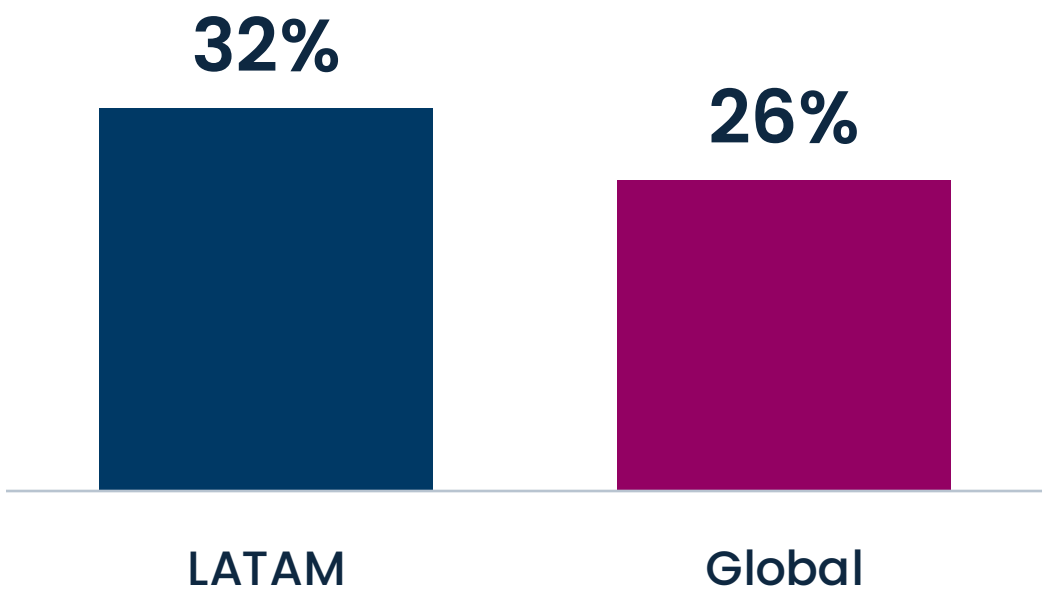
3.5x

LATAM vs. Global: our strongest regional differentiator

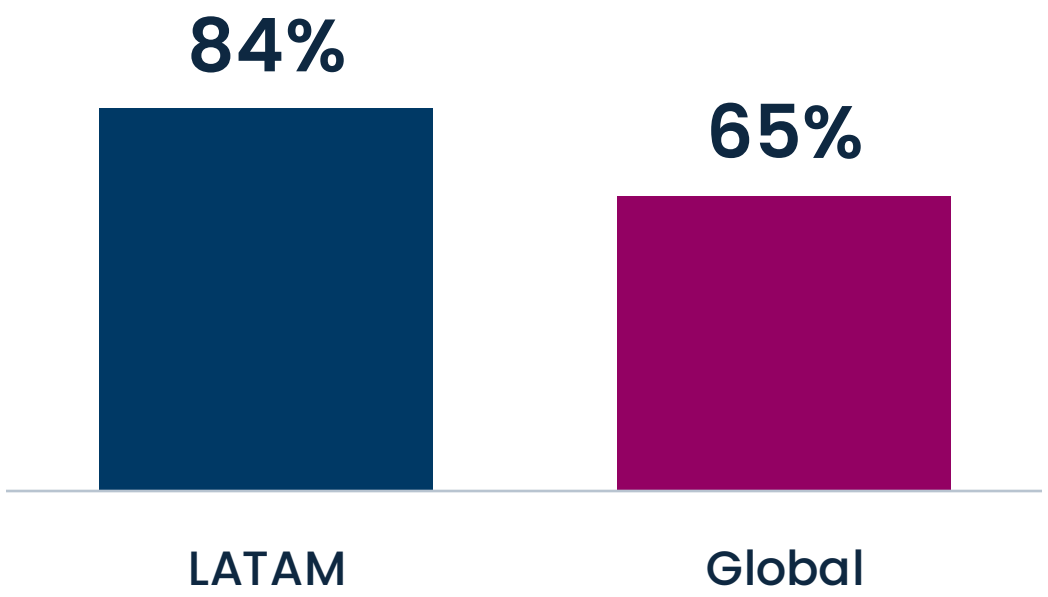
LATAM sites show a 3.5x higher rate of study opportunity growth compared to the global benchmark, representing our strongest regional differentiator.

Volume Keeping Pace

% of sites running more than 30 active studies at once



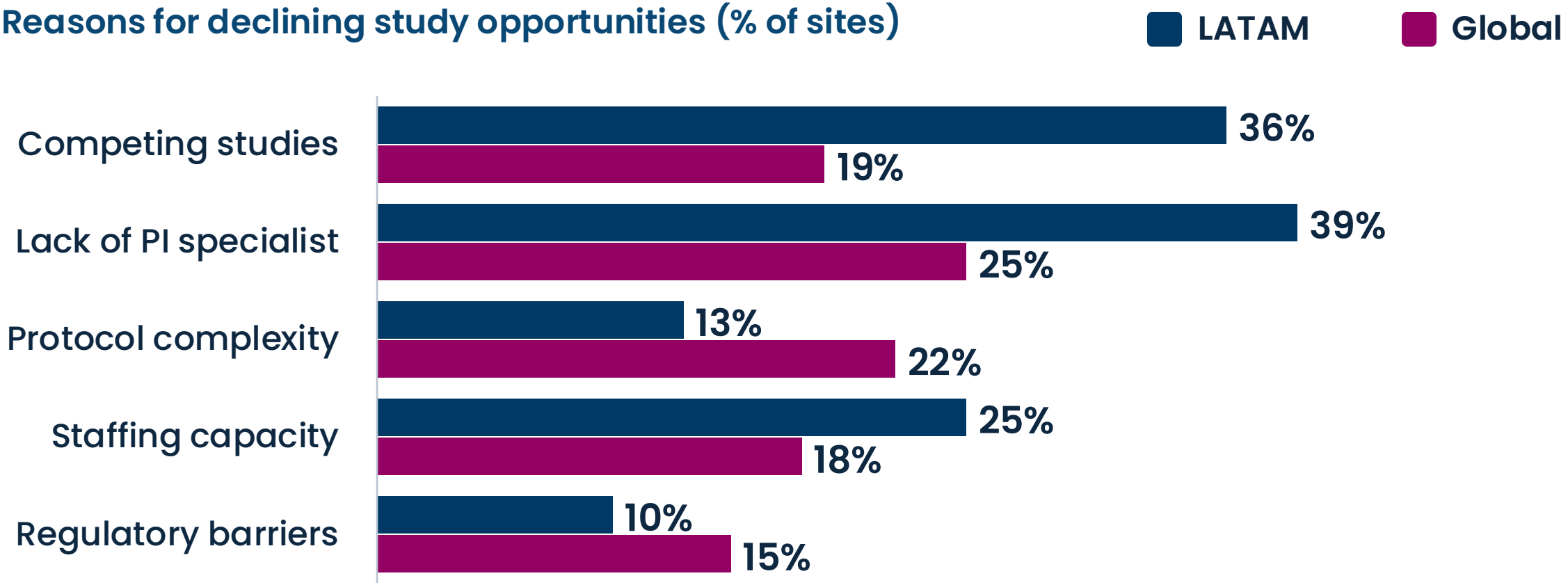
% of respondents personally involved in contract negotiations



The LATAM landscape is characterized by higher trial flow and greater site-level autonomy in administrative processes.

Why Sites Still Say No

Reasons for declining study opportunities (% of sites)



Growth is outpacing specialist capacity, not protocol complexity: PI availability and competing studies lead in LATAM.

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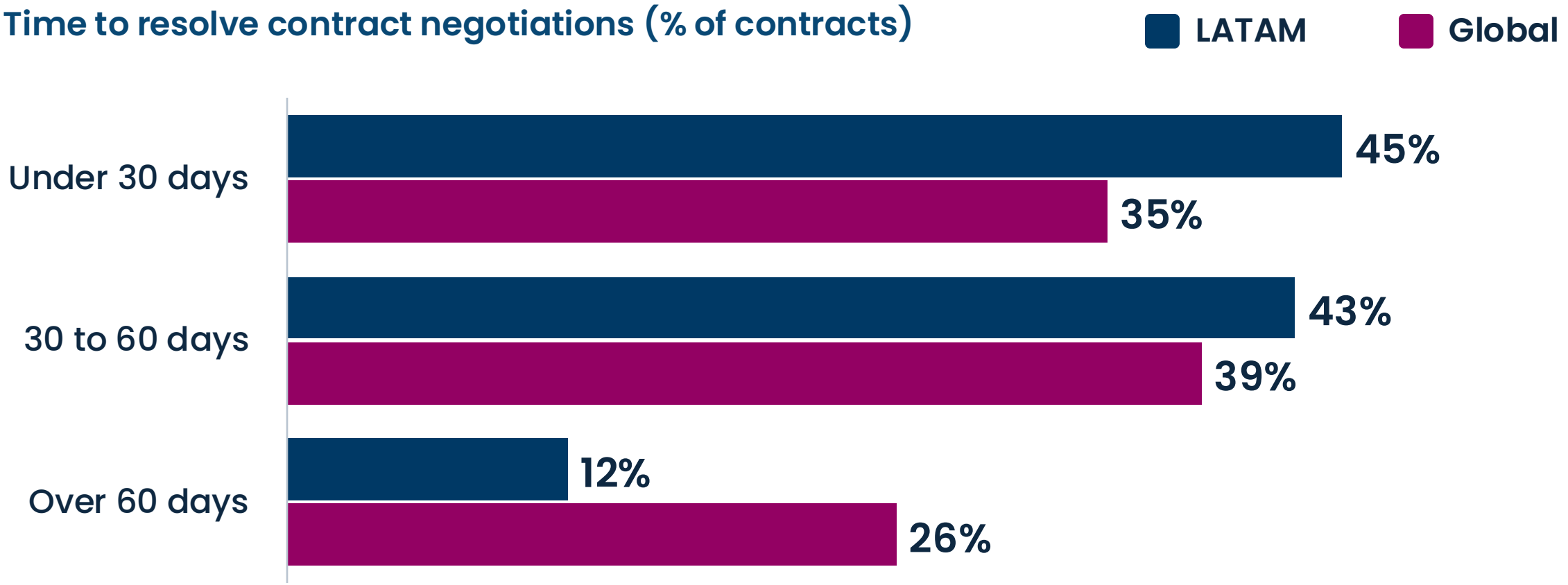
Money & Contracts: Shared Pain, One Sharp Gap

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Negotiation Speed: LATAM Is Faster

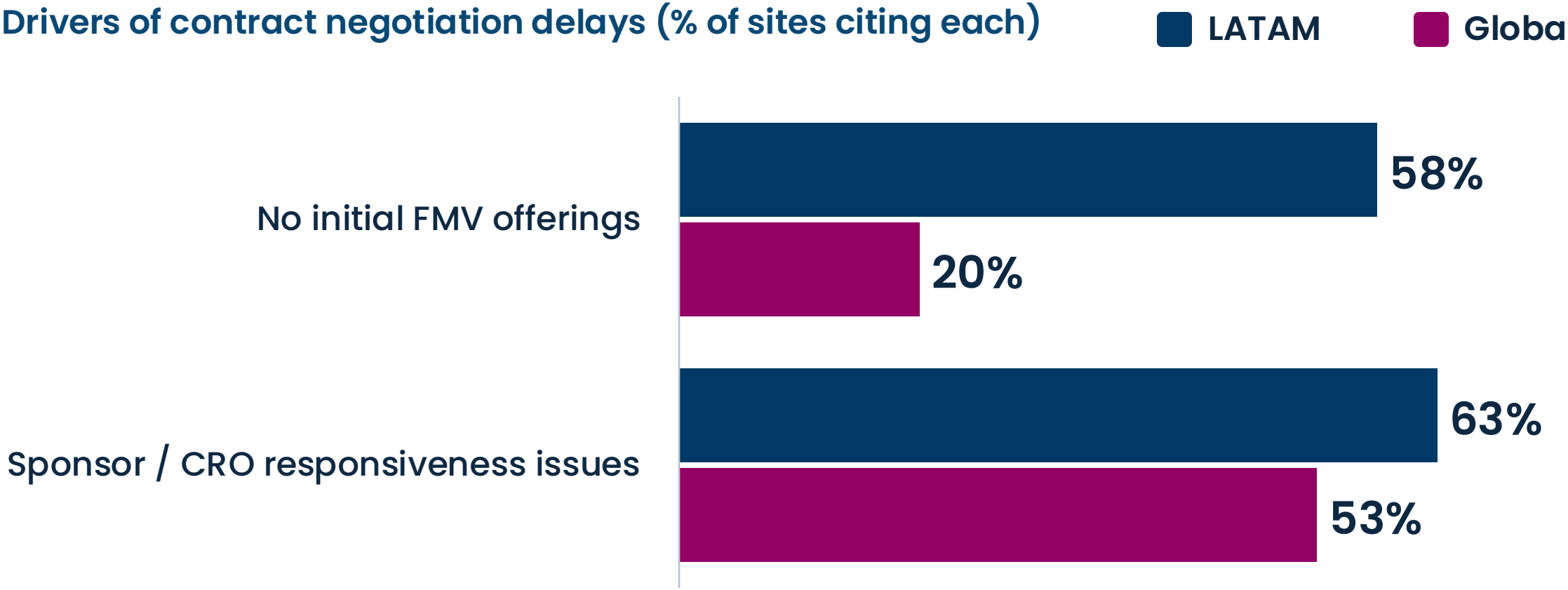
Time to resolve contract negotiations (% of contracts)



88% of LATAM contracts resolve in under 60 days, providing a 14-point advantage over global benchmarks.

The FMV Gap: Biggest Differentiator

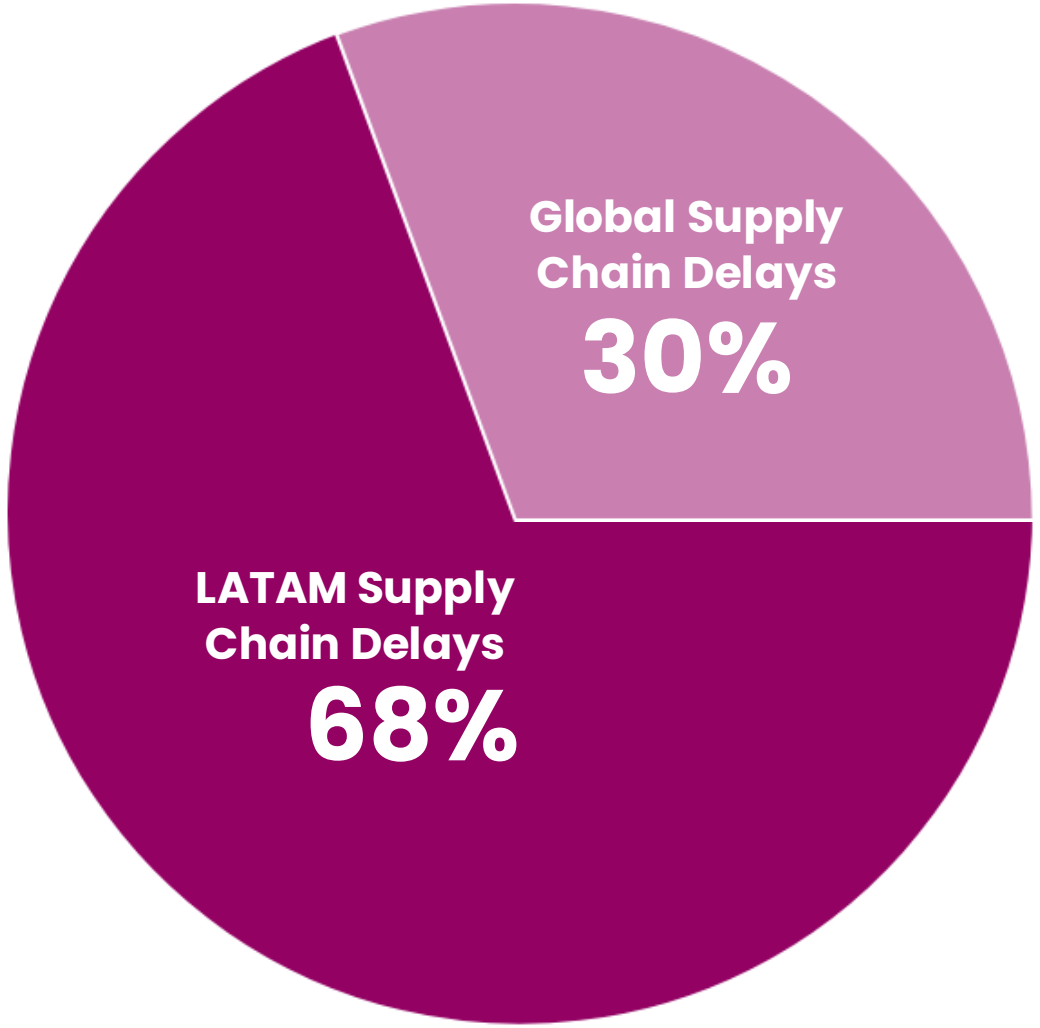
Drivers of contract negotiation delays (% of sites citing each)



FMV benchmarking remains a significant regional bottleneck in LATAM, requiring focused attention to align with global performance standards.

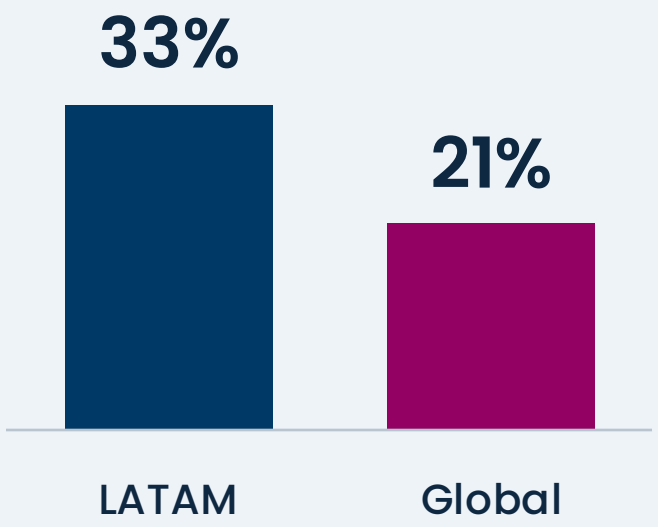
Supply Chain Is the Hidden Delay

Logistics and customs realities, not sponsor behavior, are a distinct LATAM friction point.

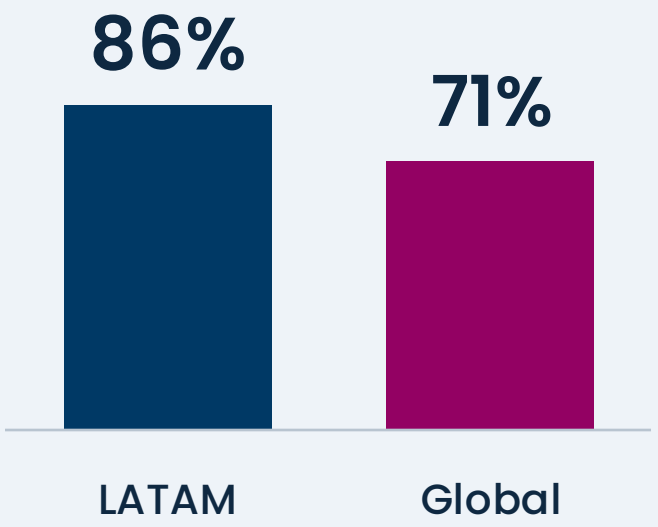


Cost Pressure Hits Harder: LATAM vs. Global

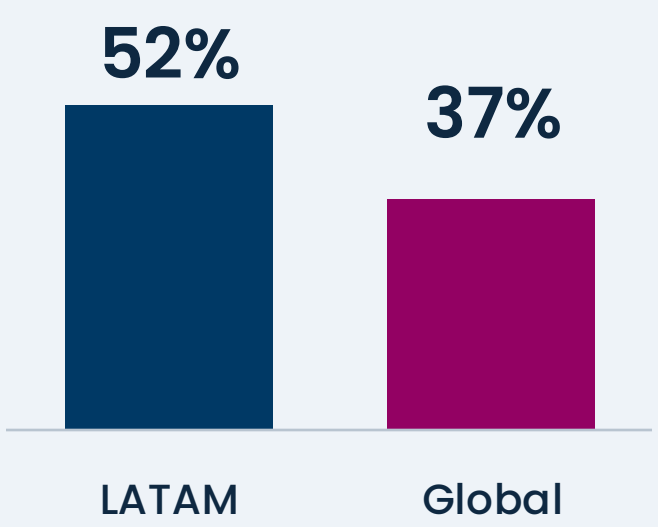
% of sites with operating costs up more than 20% in 2025



% of sites naming salary inflation the top cost driver



% of delayed-payment sites tapping credit lines



LATAM sites are experiencing financial strain, driven primarily by salary inflation and increased reliance on external credit.

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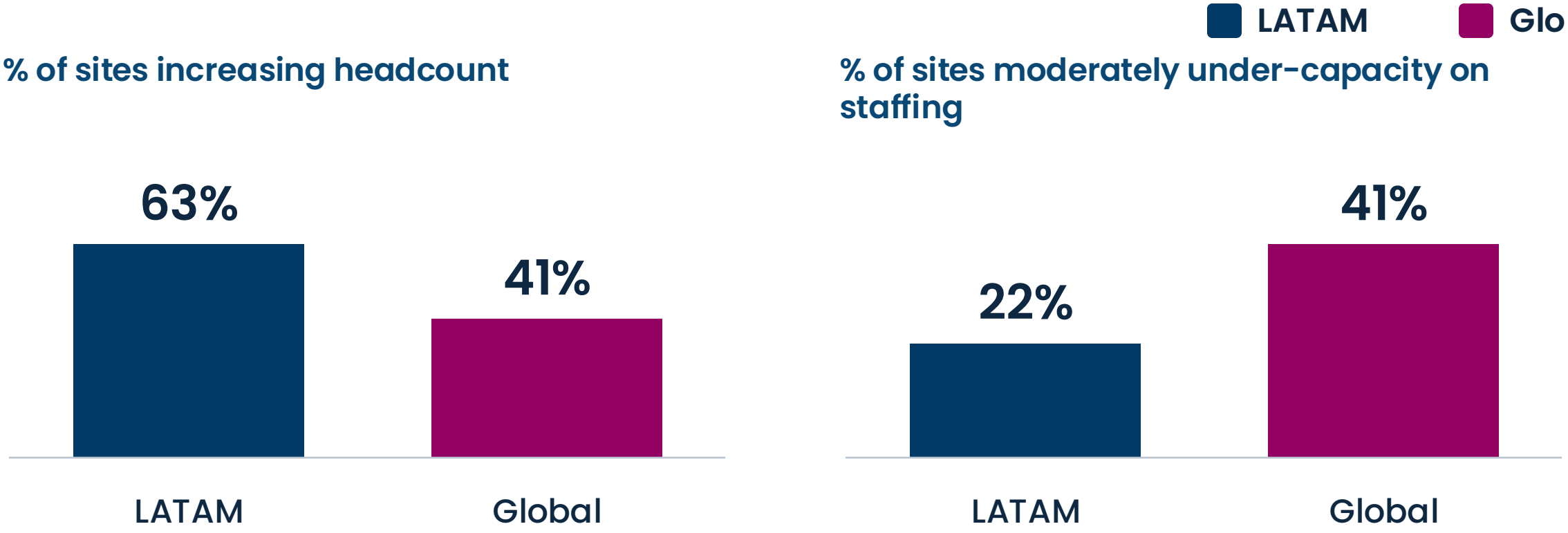
Staffing: Different Starting Point

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Growing, and Currently Comfortable

LATAM is adding people ahead of the squeeze, not catching up from behind it



LATAM is adding headcount faster (63% vs. 41%) while reporting less under-capacity strain (22% vs. 41%).

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Training Burden: The Common Ground

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Same Problem: Training Burden

Training hours and redundant training land in a similar range in LATAM and globally

≈

Training hours

LATAM and Global sites report a similar range of hours spent on training

≈

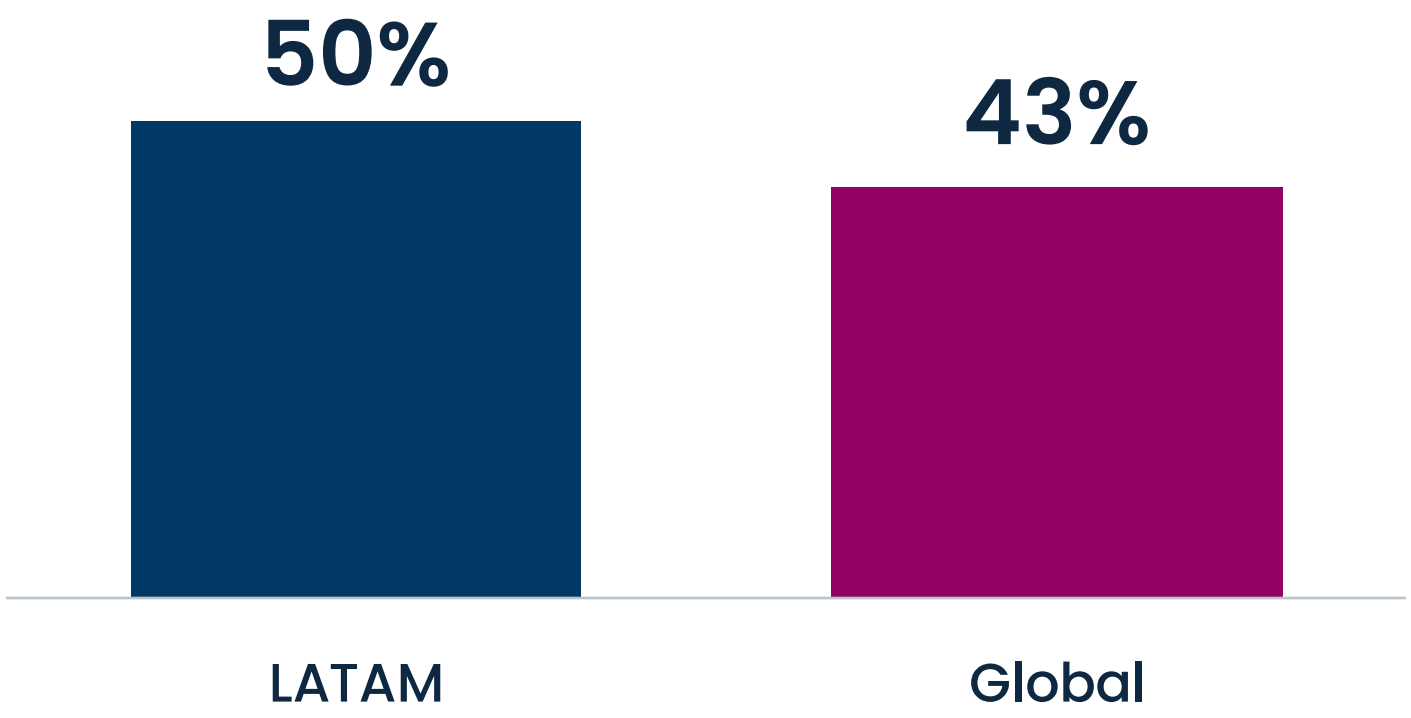
Redundant training

LATAM and Global sites repeat training in a similar range

The training burden is a shared, global problem, not a regional one.

Same Fix: Honor Prior Training

Top-ranked fix in both regions: sponsor/CRO acceptance of prior training records (% of sites)



Same fix, both regions

Accept prior training records instead of re-training.

This is an actionable, cross-regional mandate for policy change, directly supporting the 'Cut25' efficiency initiative.

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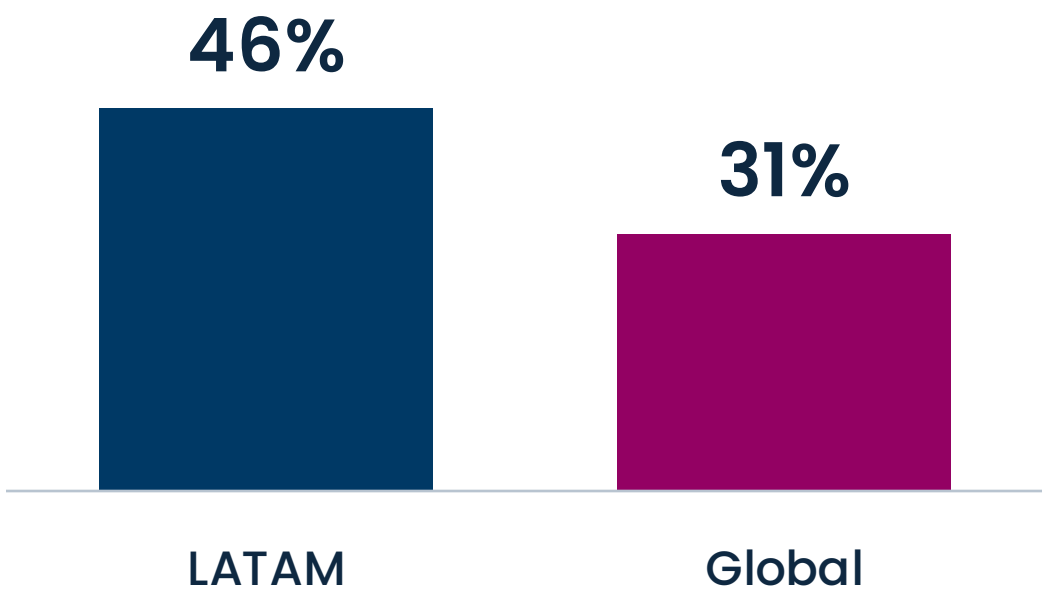
AI: LATAM Is Leapfrogging

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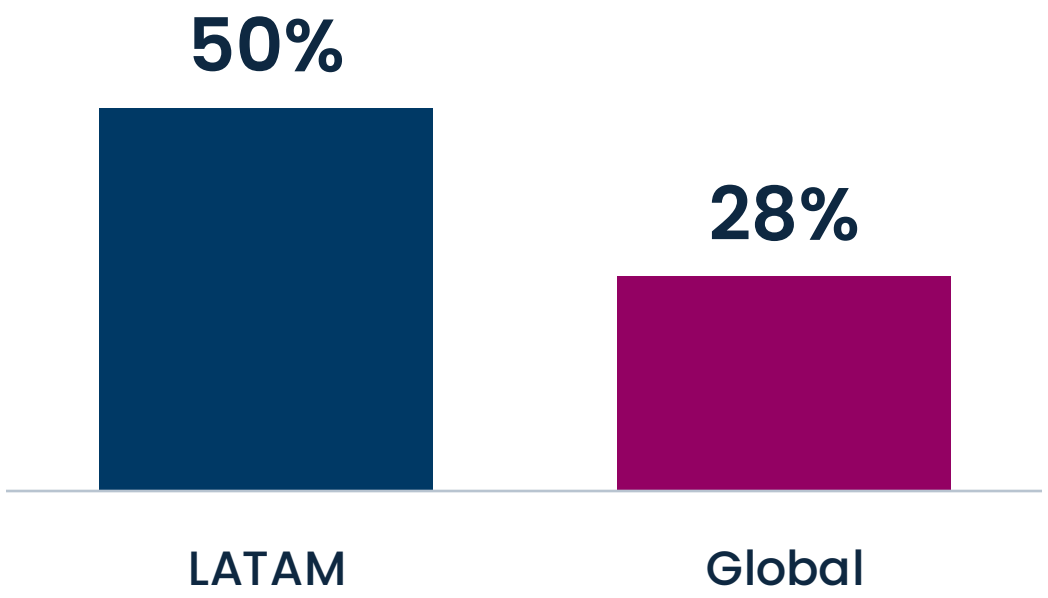
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AI Adoption Is Ahead

% of sites that independently implemented AI



% of sites naming AI a top-3 innovation focus



LATAM is outpacing global benchmarks in the integration and prioritization of AI technologies within clinical research.

Where AI Is Being Used Differs

Top AI use cases (% of sites naming each)

Global



LATAM

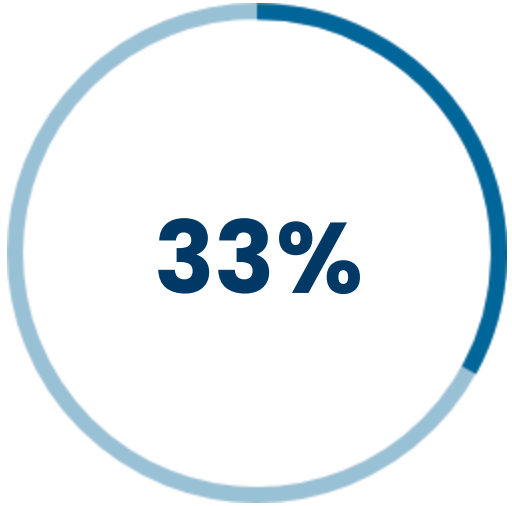


LATAM demonstrates a distinct application strategy, prioritizing administrative and financial workflows over the operational focus seen globally.

What's Holding the Rest Back



Global: Cybersecurity and Privacy



LATAM: Regulatory and Compliance Uncertainty

While both regions are navigating the path toward digital transformation in oncology, stakeholders are facing different 'brakes' on the same road.

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Technology & Community

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Fewer Systems, Same Frustration

How many systems do sites use?

57%

of LATAM sites

use only 5 to 10 systems; global use is spread more evenly

What frustrates sites most? (#1 complaint, % of sites)

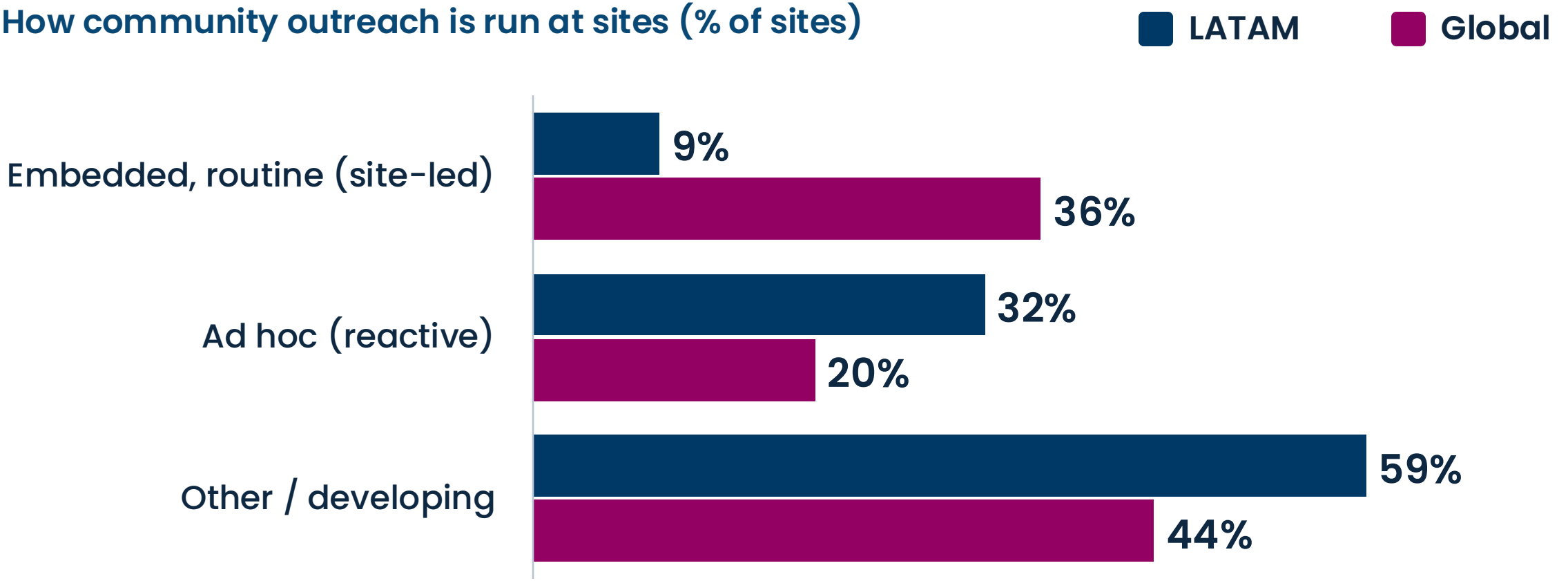
44% LATAM: integration between systems

43% Global: too many systems

Fewer tools do not equate to less frustration; the challenge has pivoted from 'too many systems' to 'systems that cannot talk to each other.'

Community Outreach: A Maturity Gap

How community outreach is run at sites (% of sites)



With only 9% of LATAM sites having embedded outreach compared to 36% globally, there is a clear strategic imperative to shift from ad hoc, reactive models to formalized, site-led infrastructure.

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2026 Priorities: Convergence + One Surprise

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Recruitment Tops Both Lists

55%

LATAM Priority

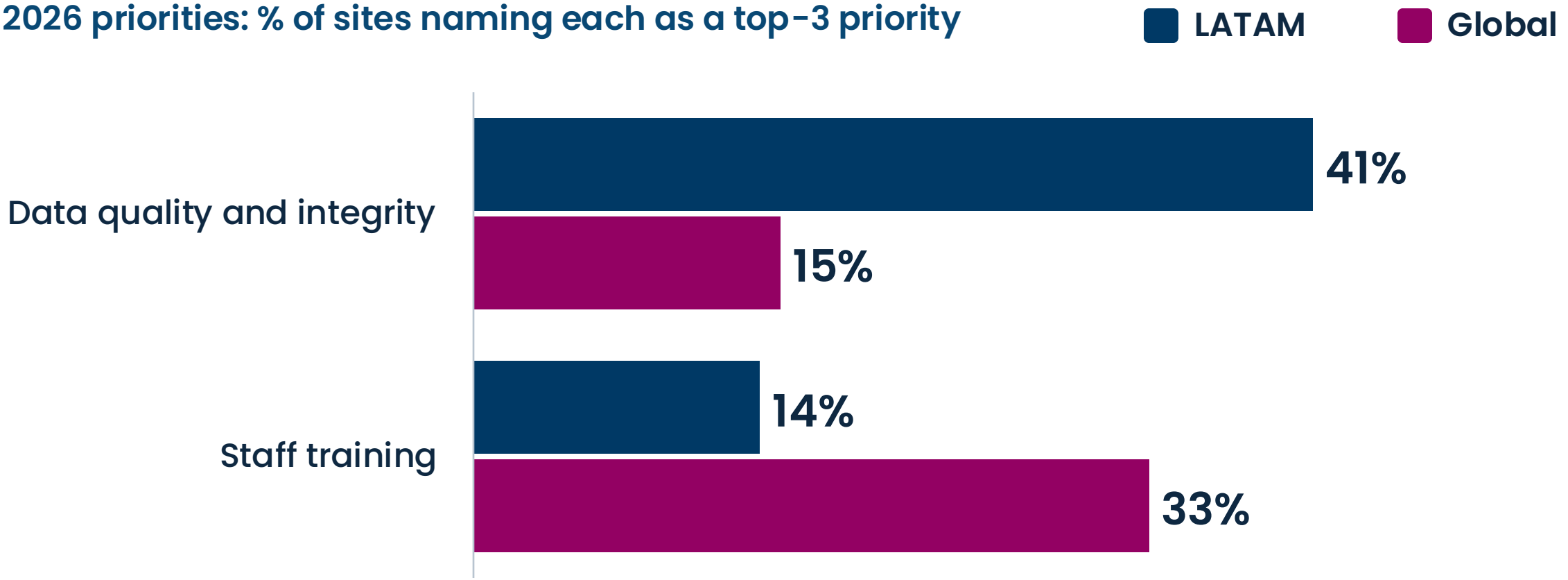
48%

Global Priority

While both regions are navigating the path toward digital transformation in oncology, stakeholders are facing different 'brakes' on the same road.

The Surprise: Data Quality

2026 priorities: % of sites naming each as a top-3 priority



LATAM's focus on data integrity is nearly 3x the global average, signaling a shift away from training-centric models toward rigorous compliance and data standards.

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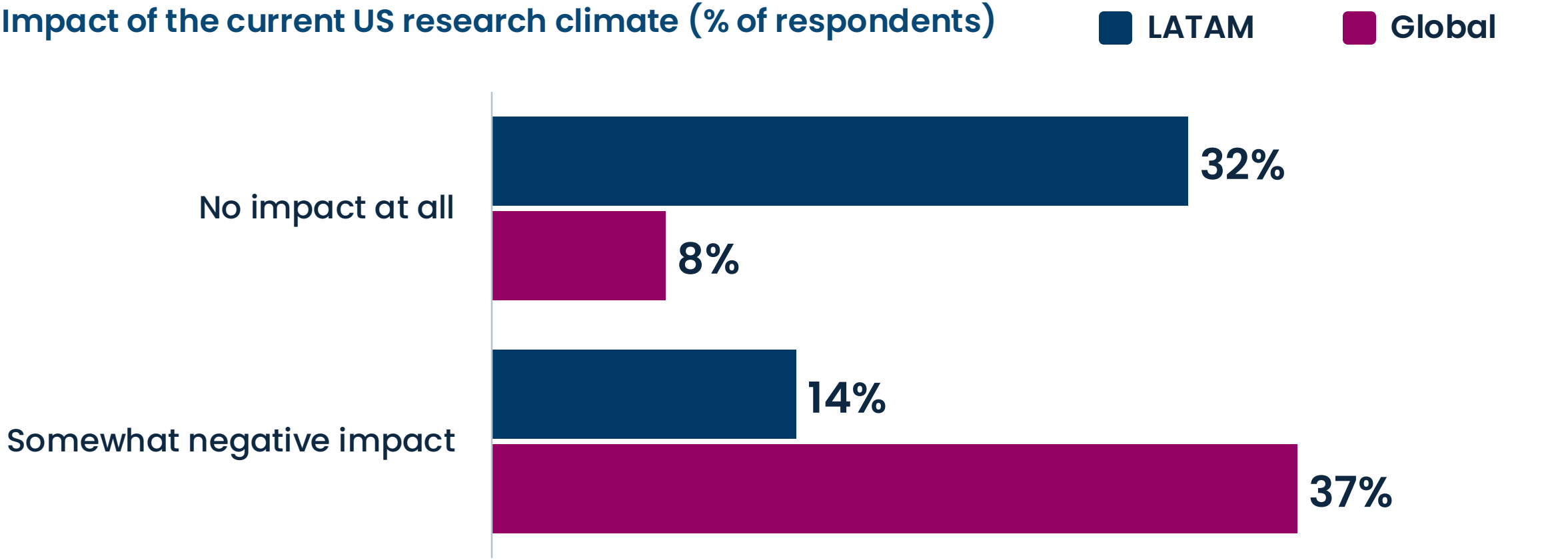
Geopolitics: A Different Risk Picture

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US Climate: Largely Insulated

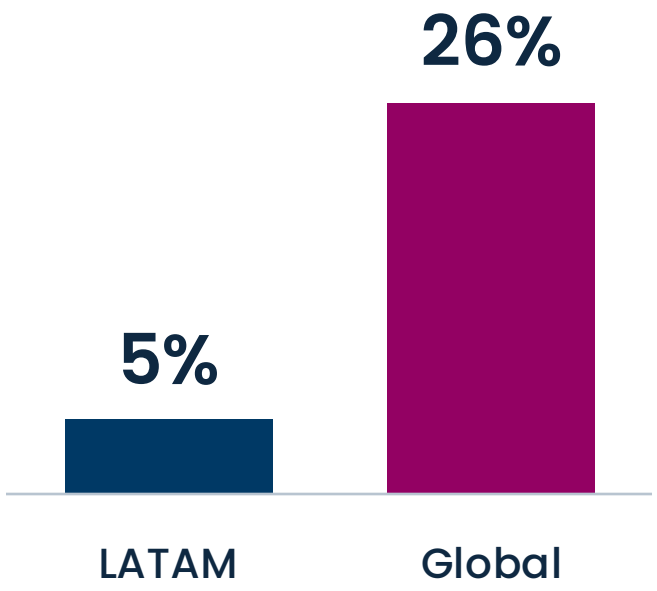
Impact of the current US research climate (% of respondents)



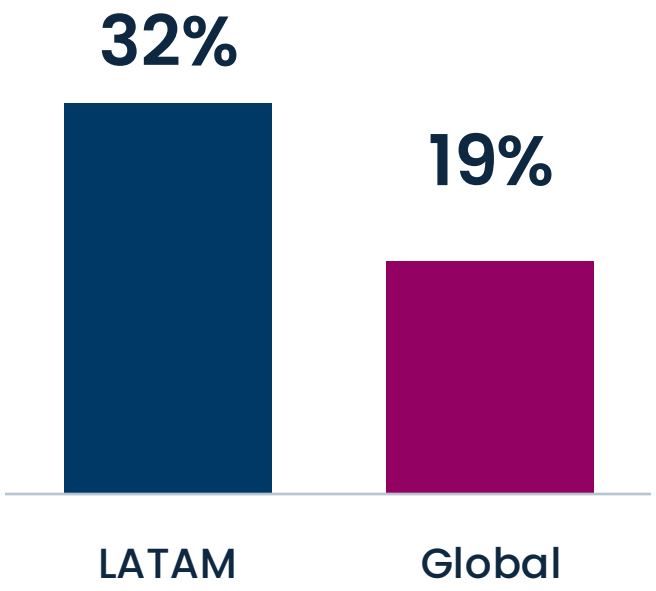
Findings suggest that the LATAM research ecosystem is operating with greater independence from US-centric market.

Confidence, Not Flight Risk

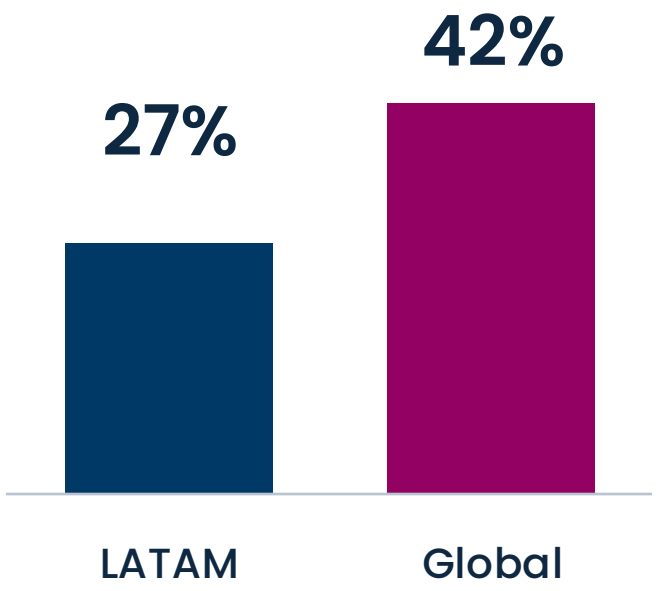
% 'a great deal' concerned about studies moving to other regions



% naming government policy stability a top competitiveness factor



% naming cost a top competitiveness factor



LATAM is emerging as a stability-driven growth destination, signaling a shift away from 'cost-play' perceptions toward long-term regional reliability.

Synthesis: The LATAM Story in One Frame

Growing Faster

LATAM is outpacing global benchmarks in new study opportunities, driven by high site engagement and rapid expansion in clinical research capacity.

Facing Its Own Frictions

Regional progress is tempered by FMV contract complexities, supply chain logistical hurdles, and regulatory caution regarding AI implementation.

Leading in Some Places

The region is carving out a lead in AI innovation adoption, trial negotiation speeds, and long-term partnership stability.

What This Means for Sites, Sponsors & SCRS

FMV Benchmarking

Standardizing Fair Market Value to ensure sustainable site operations and realistic study budgets.

Training-Record Portability (Cut25)

Reducing administrative burden and site fatigue by implementing portable, standardized training credentials.

Supply Chain Realism

Integrating logistics and supply chain constraints into early-stage protocol design to avoid operational bottlenecks.

Site-as-Infrastructure-Partner

Shifting the industry paradigm toward recognizing sites as critical infrastructure partners rather than mere transactional entities.

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