

# CROs begin consolidating site landscape

## Access to patient data, improvements in clinical trial convenience, key objectives

**M**ajor trends in drug development will reshape the global investigative site landscape. Trends to look out for include patient centricity and big data to CROs assuming responsibility for site effectiveness and patient recruitment.

As the landscape evolves, sponsors and CROs will offer patients more convenient locations for clinical trial participation, motivated in large part by the desire to engage patients as partners in developing new medical treatments. The site landscape will continue to consolidate as CROs, which increasingly manage site operations for sponsor companies, buy investigative sites or establish strategic partnerships with high-performing sites in order to have closer involvement and more control over site conduct. Clinical research will move from small investigative sites toward larger hospitals, healthcare systems and site networks. Sponsors and CROs will continue to place clinical trials in settings that have the infrastructure to support electronic health and medical records, and large patient populations.

“There is going to be a huge transformation in the investigative site landscape. It’s going to be dramatic and it’s accelerating. Sites may not be aware that it’s happening,” said Mark Lacy, founder and CEO of Benchmark Research.

Strategies and partnerships implemented throughout the clinical research industry in recent years offer insight into the direction the site landscape is moving. Icon’s groundbreaking acquisition of PMG Research, for

### Major site networks and their owners/investors

Network	Number of owned/ dedicated sites	Number of integrated and affiliated locations	Owner/investors
Benchmark Research	6	0	Privately owned
CCBR	23	0	Bioclinica (contract specialty clinical trial services provider)
Radiant Research	25	60	Jaguar Holding Company (parent company of PPD (CRO))
PMG Research	12	48	Icon (CRO)
RxTrials	1	16	Privately owned
Synexus	25	65	Management buy out of Lyceum Capital with support from LDC Private Equity

Source: CenterWatch

example, and strategic partnerships between other CROs and experienced investigative sites signal new CRO/site relationships and greater consolidation in the space. Similarly, a parent company of PPD—Jaguar Holdings—invested in Radiant Research, one of the country’s largest integrated site networks, last April. The two companies operate independently.

LabCorp’s acquisition of Covance and the joint venture between Quintiles and Quest Diagnostics offer global CROs access to thousands of remote laboratory locations where patients potentially could participate in a clinical study. Benchmark Research has begun a new model that combines clinical research sites with urgent and family

care centers located in high-traffic retail areas. There are many examples of sponsors and CROs establishing partnerships with healthcare systems and site networks that have access to large amounts of electronic patient data.

CenterWatch looks at how some of the most important drug development trends in recent years are likely to change the global investigative site landscape and what they could mean for independent, community-based sites going forward.

### Patient convenience

As the concept of patient centricity has moved to the forefront of drug