The 2023 WCG Avoca State of the Industry Report

360° Assessment of the Clinical Trial Industry

June 2023
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Background
360° Assessment of the Clinical Trial Industry

**Situation**

Industry and regulatory focus on patient centricity is imperative to ensure the survival of the clinical trial industry. Most Sponsor and Provider organizations base their study designs on feedback from investigators and patients who are familiar with clinical trials. In order to expand the patient pool for clinical research, Sponsors must develop protocols that meet the needs of research-naïve patients and investigators.

**Objective**

This research looks across clinical research stakeholders -- Sponsors, Providers, Site Staff and Patients -- regardless of their clinical trial experience to identify opportunities for improvement of the experience for Patients and Sites.

Small population of physicians and patients contribute to what we know about motivations and impediments toward clinical trial participation.

- 3% of physicians participate in clinical research
- <5% of cancer patients participate in clinical research
Methodology
**Methodology**

**Sample**
- **Sponsors & Providers**
- **Site Personnel**
- **Patients**

**Approach**
- A **15-minute online survey** was developed.
- It was designed such that questions were asked in the context/language unique to each audience - but ensured **parallel lines of questioning to allow for comparison across audiences.**
- Fieldwork was conducted between **December 2022** and **March 2023**.

**Recruitment**
For each audience, a **variety of channels were used for survey recruitment**, including:
- WCG Sponsor and Site networks
- Avoca Quality Consortium (AQC)
- WCG Patient advocacy groups
- Social networks
- Relationships with partner organizations

Additional detail on participants and sample composition data can be found in the appendix of this report.
360° Research Highlights
Recruiting participants is hard work

<table>
<thead>
<tr>
<th></th>
<th>Sponsors &amp; Providers</th>
<th>Site Personnel</th>
<th>Patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicked-Through</td>
<td>1,408</td>
<td>4,641</td>
<td>535</td>
</tr>
<tr>
<td>Participated</td>
<td>102</td>
<td>130</td>
<td>130*</td>
</tr>
<tr>
<td>Response Rate</td>
<td>7%</td>
<td>3%</td>
<td>24%</td>
</tr>
</tbody>
</table>

*Represents patient respondents before additional outreach was done with a national sample of N=200, as discussed on slides that follow.
“Usual” recruitment methods yielded a highly skewed Patient sample

CENSUS*  PATIENT SAMPLE

Gender: Female
50%  80%

Household Income: $100k +
34%  57%

Education: College/Advanced Degree
35%  90%

Base: N=130 WCG/Avoca Patient Sample
*Sourced from online Census data: 1, 2, 3
We fell into the same trap we were trying to solve for...

...so, we went back into the field to survey an additional N=200 Patient respondents who reflect the national population in terms of key demographic and socioeconomic variables:

- Age
- Gender
- Ethnicity
- Household income
- Educational attainment
- Region

What we found...
Clinical trials are unchartered territory; most have no engagement, there is skepticism and fear

75% of national respondents have no personal experience with clinical trials*

"They seem very scary, and I feel usually they just look for the side effects and don't really care how bad a person can potentially get."

"Not open to trying things that haven't been proven to work. It would depend upon the trial and what was involved."

I believe clinical trials only benefit the pharmaceutical companies that run them.

36% Agree
36% Neutral
29% Disagree

Base: N=200 National Respondents
*No experience themselves and no friends/family who have participated

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In addition, there are also “tangible” concerns, such as feeling unwell, time commitment and requirements of participation.

86% have concerns about getting sick or feeling unwell.

What happens to our bodies by participating in these experiments is my biggest concern.

Having significant side effects from the trial making my situation worse than it was before I got involved in the clinical trial.

What am I committing to?

- 72% have concerns about time commitment.
- 80% have concerns about number of procedures required.
- 83% have concerns about types of procedures required.

Base: N=200 National Respondents
Given the concerns noted, interest in participating in a trial in the future is fragmented.

**Likelihood to Participate in a Clinical Trial**

- 4% Definitely would
- 8% Probably would
- 31% Might or might not
- 37% Probably would not
- 20% Definitely would not

---

*The trial and any possible benefits would have to interest me greatly.
[Might or might not]*

*It would depend on the risks involved, how much is known and whether I felt like the benefit outweighed the cost. I would be more likely to participate if I needed a certain treatment to be healthy.
[Might or might not]*

Base: N=184 National Respondents (who have never participated in clinical trial)
However, benefits around outcomes, compensation, opportunity to learn and contribute to science show potential to positively influence prospective participants.

<table>
<thead>
<tr>
<th>Influences on Desire to Participate*</th>
<th>89%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hope that the clinical trial treatment would improve health/medical condition</td>
<td></td>
</tr>
<tr>
<td>Compensation/payment for participation</td>
<td>88%</td>
</tr>
<tr>
<td>Opportunity to learn more about health/medical condition</td>
<td>84%</td>
</tr>
<tr>
<td>Opportunity to contribute to science</td>
<td>83%</td>
</tr>
<tr>
<td>Curiosity about the product/treatment being researched</td>
<td>82%</td>
</tr>
<tr>
<td>Access to better doctors than you would otherwise be able to use</td>
<td>80%</td>
</tr>
</tbody>
</table>

*Percent indicating the item to have some or significant influence on desire to participate in clinical trials in the future

HELPING OTHER PEOPLE.

Depending on the trial, it could help a condition you currently have. I’m sure they pay, too!
To the extent the experience can be made “personal” (access to records, see own doctor) this could be further motivation to participate.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to receive all of your personal data and results from the clinical trial</td>
<td>73%</td>
</tr>
<tr>
<td>Able to see your regular or preferred doctor for clinical trial visits</td>
<td>70%</td>
</tr>
<tr>
<td>Provided with transportation, reimbursement for travel expenses</td>
<td>69%</td>
</tr>
</tbody>
</table>

Base: N=184 National Respondents (who have never participated in a clinical trial)

*Percent indicating the item to have some or significant impact on desire to participate in clinical trials in the future.
What does the experience actually look like for clinical trial participants?
Those who have participated generally report positive experiences

61% said they had no issues with feeling sick or unwell

It was a good experience. My medical condition improved and I was able to contribute to science. The medication is now approved and is helping people.

What was the experience like?

- 72% said their expectations on time commitment were met
- 72% said tests and procedures met expectations
- 80% liked the healthcare professionals they worked with

Base: N=46 Clinical Trial Participants (from National Sample + WCG/Avoca Sample)
Overall, respondents with trial experience felt it was worthwhile and would participate again

85% agree that ‘the time I spent participating in this clinical trial was worthwhile’

90% said they would ‘definitely’ or ‘probably participate in a clinical trial again in the future’

“It was easy, the product being tested improved my skin, and I was paid – easy money.”
This suggests there may be opportunity to leverage positive experiences to attract new participants.

45% say that a friend or family member would be among their most trusted sources for information on clinical trials.

Base: N=200 National Respondents
Healthcare professionals represent even greater potential to connect with patients - they are the MOST trusted source of info

45% say that a friend or family member would be among their most trusted sources for information on clinical trials

79% say that their regular doctor or healthcare professional would be among their most trusted sources for information on clinical trials

Base: N=200 National Respondents
Understanding the site experience
Site staff generally agree that trials are designed with patients in mind and are likely to recommend participation to a friend.

"I have seen things work miracles for people that would've never even tried it because of cost."

65% agree that ‘clinical trials are designed with patients/volunteers in mind’

82% said they would ‘definitely’ or ‘probably recommend participating to a friend or family member’
Sites have altruistic motivation for participating - they have a strong desire to advance the field and bring patients new treatment options

**Reasons for Participation**

- Desire to **contribute to the advancement** of field/science: 96%
- Ability to bring **new/better treatments** to patients: 95%
- Curiosity/interest in the **new treatment** being researched: 89%
- Desire to **stay up-to-date** on treatments in specialty area: 87%

*Participating in clinical research is a **core component to our dedication to patients**. Ensuring the best therapies available for our patient population is important to them receiving the best care possible.*

Base: N=112 Site Sample
Because of this, there is strong likelihood to participate again

- 84% agree that ‘the time I spent participating in this clinical trial was worthwhile’
- 94% said they would ‘definitely’ or ‘probably participate in a clinical trial again in the future’

"Scientific innovation is exciting and groundbreaking, and it is fulfilling to be part of it. Especially given the vulnerability of our patient population, it is motivating knowing that our work makes or will potentially make a difference in their lives."
That said, the experience is not always “ideal” in terms of logistics and burden as it relates to site responsibility...

<table>
<thead>
<tr>
<th>Start-Up</th>
<th>Maintenance</th>
<th>Closeout</th>
</tr>
</thead>
<tbody>
<tr>
<td>% strongly agree</td>
<td>% strongly agree</td>
<td>% strongly agree</td>
</tr>
<tr>
<td><code>budget negotiation was timely &amp; efficient</code> 31%</td>
<td><code>protocol was clear &amp; easy to follow</code> 38%</td>
<td><code>compensated fairly &amp; on time</code> 27%</td>
</tr>
<tr>
<td><code>contracting process was timely &amp; efficient</code> 31%</td>
<td><code>study stayed on timeline</code> 29%</td>
<td></td>
</tr>
</tbody>
</table>

"The benefits for people and the improvements in medicine, far outweigh the stress, incompetence, issues, faulty devices or changes that occur during a clinical trial. They are all different, but they all have issues in one way or another."
...and only a minority feel that the site perspective is considered

15% ‘strongly agree’ that ‘clinical trials are designed with sites/site staff in mind’

ASK SITES FOR INPUT ON YOUR PROTOCOL. You are NOT an expert at boots-on-the-ground enrollment. Ask someone who is.

Put clinical trialist physicians, nurses & pharmacists in charge of the research divisions with sufficient authority to run them properly. It’s clear that the companies are too interested in the financial aspects & care too little about the science or patient care aspects of pharmaceutical research.
Sponsor & Provider Point of View
Sponsors/Providers have varied thoughts on why sites participate...

**Reasons Sites Participate**

- **Ability to bring new/better treatments to patients**: 49%
- **Desire to contribute to the advancement of field/science**: 43%
- **Compensation/financial reasons**: 39%
- **Acclaim/prestige**: 10%

> Ultimately, it's a business. But it also helps them provide their patients with potentially new/life-changing therapies that they might not otherwise be able to get for a variety of reasons.

Only 63% of Sites said compensation influenced them, compared to 96% who want to contribute to science.

Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)
but, do generally agree on barriers to site participation…

Site Burden: Strain on time and staffing resources

Available resources to conduct a clinical trial. Dedication of the investigator. Trained/skilled staff to conduct a specific trial.

Don't have the staffing, don't understand the amount of staffing required, don't have the time, don't have the patient population.
...and acknowledge their own role in creating potential obstacles

Overzealous protocols and unclear information.

Bureaucratic start-up process and tight budgets with lack of support from the Sponsor.

Overly complicated and constantly amended protocols.

Start-up timelines, limited access to patient population, potential benefit of trial vs. burden on patients/burden on staff.

Not being able to find the right patients to meet criteria. Not having enough time to conduct complex trials. And even if the PI has a great interest in participating, some of those who coordinate may prefer a less complex trial to enroll subjects in because of the burden placed on them.
## Key Take-Aways

### FINDINGS

#### PATIENTS
- Clinical trials are an “enigma” for most people
- Though actual trial participants generally report a favorable experience, there is a lack of understanding and awareness among the broader population

#### SITES
- Site personnel are motivated to participate in trials, wanting the best for patients and insight into the latest science in their TAs
- They truly believe in the good that clinical trials can offer, but the experience is not always ideal

#### SPONSORS & PROVIDERS
- Sponsors & Providers generally understand that Sites are motivated by altruistic reasons
- That said, they realize that they are highly burdened by the strain on resources and complexity that trials bring

### IMPLICATIONS

- → Suggests a need to **raise awareness and educate** to inform on trial benefits and reduce barriers to participation
- → **Site perspective needs to be elevated in importance** - consider eliciting site feedback from the outset of study design
- → Opportunity to **revisit how trials are designed, staffed & compensated** to ensure sites are appropriately accommodated for their efforts
Learn more about WCG Avoca Industry Research

For more than 20 years, WCG Avoca has surveyed industry executives to gain an understanding of key trends affecting outsourced clinical development. Industry leaders rely on our insights to strengthen relationships and enhance R&D quality and productivity.

Access Research Reports
Additional Analysis

Site Personnel
Sample Composition

Role
- Doctor: 60%
- Nurse: 29%
- Other HCP: 12%

Tenure in Profession
- More than 20 years: 37%
- 16 to 20 years: 13%
- 11 to 15 years: 11%
- 6 to 10 years: 13%
- 1 to 5 years: 23%
- Less than 1 year: 4%

Specialty Area(s)
- Vaccines: 27%
- Cardiovascular: 24%
- Infectious Disease: 23%
- GP/Internal/Family Medicine: 22%
- Pulmonology/Respiratory: 21%
- Gastroenterology: 19%
- Oncology: 19%
- Endocrinology: 18%
- Rheumatology: 17%
- Women's Health: 17%
- Dermatology: 15%
- Musculoskeletal/Pain: 14%
- Nephrology: 14%
- Allergy: 13%
- CNS/Neurology/Psychiatry: 11%
- Immunology: 11%
- Genitourinary: 10%
- Metabolism: 10%
- Pediatric Medicine: 10%
- Hematology: 9%
- Orthopedics: 7%
- Cell (CAR T)/Gene Therapy: 6%
- Ophthalmology: 6%
- Anesthesia: 4%
- Orphan/Rare Disease: 2%
- Other practice area: 24%

Practice Type
- Group practice: 34%
- Academic center/hospital: 26%
- Solo practice: 14%
- Community hospital: 5%
- College health center: 2%
- Gov't health agency: 1%
- Other: 18%

Practice Location
- Urban: 57%
- Suburban: 37%
- Rural: 5%

Vaccine distribution chart and Practice area distribution chart.
Q. Please review the statements below and rate your personal level of agreement with each.

Clinical trials are designed to look at the possible benefits and risks of drugs and vaccines in an honest, unbiased way.

- Strongly disagree: 6%
- Somewhat disagree: 4%
- Neither agree nor disagree: 25%
- Somewhat agree: 61%

The data and results of clinical trials are reported accurately and in an unbiased way.

- Strongly disagree: 5%
- Somewhat disagree: 8%
- Neither agree nor disagree: 9%
- Somewhat agree: 33%
- Strongly agree: 45%

I believe that companies that conduct clinical trials strive to have a diverse population of participants.

- Strongly disagree: 6%
- Somewhat disagree: 14%
- Neither agree nor disagree: 13%
- Somewhat agree: 31%
- Strongly agree: 36%

Clinical trials are designed with patients/volunteers in mind.

- Strongly disagree: 5%
- Somewhat disagree: 13%
- Neither agree nor disagree: 19%
- Somewhat agree: 35%
- Strongly agree: 29%

Clinical trials are designed with sites/site staff in mind.

- Strongly disagree: 9%
- Somewhat disagree: 26%
- Neither agree nor disagree: 20%
- Somewhat agree: 30%
- Strongly agree: 15%
### Most Recent Clinical Trial Experience

<table>
<thead>
<tr>
<th>Role</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRC/Research Nurse</td>
<td>48%</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>25%</td>
</tr>
<tr>
<td>Research/Operations Manager</td>
<td>17%</td>
</tr>
<tr>
<td>Sub-Investigator</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Under Investigation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication/treatment</td>
<td>58%</td>
</tr>
<tr>
<td>Vaccine</td>
<td>22%</td>
</tr>
<tr>
<td>Medical device</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Can't remember</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Site Compliance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strictly followed protocol</td>
<td>80%</td>
</tr>
<tr>
<td>Mostly followed protocol</td>
<td>13%</td>
</tr>
<tr>
<td>Only followed some of the protocol</td>
<td>3%</td>
</tr>
<tr>
<td>Can't remember</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant Compliance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strictly followed protocol</td>
<td>8%</td>
</tr>
<tr>
<td>Mostly followed protocol</td>
<td>81%</td>
</tr>
<tr>
<td>Only followed some of the protocol</td>
<td>9%</td>
</tr>
<tr>
<td>Can't remember</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Influence on Participation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desire to contribute to advancement of field/science</td>
<td>96%</td>
</tr>
<tr>
<td>Ability to bring new/better treatments to patients</td>
<td>95%</td>
</tr>
<tr>
<td>Curiosity/interest in the new treatment being researched</td>
<td>89%</td>
</tr>
<tr>
<td>Desire to stay up-to-date on treatments in specialty area</td>
<td>87%</td>
</tr>
<tr>
<td>Build site reputation for innovation</td>
<td>84%</td>
</tr>
<tr>
<td>Participate in research seeking diverse population</td>
<td>64%</td>
</tr>
<tr>
<td>Compensation for participation</td>
<td>63%</td>
</tr>
<tr>
<td>Attract new patients to the practice</td>
<td>57%</td>
</tr>
<tr>
<td>Ability to use technology to reduce in-person visits</td>
<td>46%</td>
</tr>
</tbody>
</table>

Base: N=109-112 Site Sample (Participants in Clinical Trials)
Perceptions of Trial Experience

Ratings of Site Experience

% indicating they somewhat/strongly agree

- I feel like we/I contributed to the advancement of our field/science because of our participation: 90%
- I learned something new about the treatment and/or condition being researched: 89%
- I feel that the time I spent participating in this clinical trial was worthwhile: 84%
- Participating in this trial allowed me/my site to stay-up-to-date on treatments in our specialty area: 80%
- We were able to bring new/better treatments to patients as a result of participating in this trial: 78%
- The study protocol was clear and easy for the site to follow: 75%
- Participation in this clinical research had a positive impact on our practice’s reputation: 75%
- The CRA/study monitor was accessible and responsive: 73%
- The amount of time that I spent participating in the trial met my expectations: 71%
- The company sponsoring this research gave appropriate consideration for the patient perspective: 70%
- The technology the site was asked to utilize to conduct the study was easy to use: 66%
- The trial stayed on timeline, and started and finished as planned: 56%
- My site was compensated fairly and on time for participation in this trial: 56%
- The contracting process was done in a timely and efficient manner: 52%
- Budget negotiation was done in a timely and efficient manner: 51%
- We attracted new patients to the practice as a result of participating in this trial: 50%

Likelihood to Participate Again

- Definitely would participate: 80%
- Probably would participate: 13%
- Might or might not participate: 2%
- Probably would not participate: 3%
- Definitely would not participate: 2%

Base: N=112 Site Sample (Participants in Clinical Trials)

Q. All things considered, based on your experience as a member of an investigative site, how likely would you/your site be to participate in another clinical trial in the future?
Additional Analysis

Sponsors/Providers
Sample Composition

Company Type

<table>
<thead>
<tr>
<th>Function</th>
<th>Sponsor</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Development/Operations</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Quality Assurance/Quality Control &amp; Compliance</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>Medical/Scientific</td>
<td>3%</td>
<td>97%</td>
</tr>
<tr>
<td>Alliance Management/Partnering</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Business Development</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Data Management</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Executive Management</td>
<td>1%</td>
<td>99%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>97%</td>
</tr>
</tbody>
</table>

Level/Role

- C-Suite/President: 3%
- Vice President/Sr. VP: 10%
- Director/Head: 54%
- Manager/Sr. Mgr: 24%
- Associate: 10%

Tenure in Role

<table>
<thead>
<tr>
<th>Tenure in Role</th>
<th>Sponsor</th>
<th>Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 5 years</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>6 to 10 years</td>
<td>14%</td>
<td>86%</td>
</tr>
<tr>
<td>11 to 15 years</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>16 to 20 years</td>
<td>16%</td>
<td>84%</td>
</tr>
<tr>
<td>More than 20 years</td>
<td>55%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Specialty Area(s)

- Oncology: 48%
- Orphan/Rare Disease: 34%
- Immunology: 28%
- Immunology: 28%
- CNS/Neurology/Psychiatry: 26%
- Pulmonology/Respiratory: 26%
- Cardiovascular: 24%
- Infectious Disease: 23%
- Endocrinology: 18%
- Musculoskeletal/Pain: 18%
- Vaccines: 18%
- Gastroenterology: 14%
- Hematology: 14%
- Dermatology: 13%
- Cell (CAR T)/Gene Therapy: 11%
- Metabolism: 10%
- Ophthalmology: 10%
- Women's Health: 10%
- Allergy: 9%
- Rheumatology: 9%
- Nephrology: 8%
- Genitourinary: 6%
- Anesthesia: 4%
- Orthopedics: 4%
- Other practice area: 9%
- Orphan/Rare Disease: 2%
- Other practice area: 24%

Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)
**Agree/Disagree Statements**

<table>
<thead>
<tr>
<th>Agree/Disagree Statements</th>
<th>Strongly disagree</th>
<th>Somewhat disagree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical trials that my company conducts are designed to look at the possible benefits and risks of drugs and vaccines in an honest, unbiased way.</td>
<td>3%</td>
<td>13%</td>
<td>84%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The data and results of clinical trials that my company conducts are reported accurately and in an unbiased way.</td>
<td>3%</td>
<td>10%</td>
<td>83%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthcare professionals working on clinical trials that my company conducts carefully monitor the well-being of participants.</td>
<td>3%</td>
<td>25%</td>
<td>69%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I believe that my company strives to have a diverse population of participants in clinical trials that it conducts.</td>
<td>4%</td>
<td>20%</td>
<td>31%</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Clinical trials that my company conducts are designed with participants in mind.</td>
<td>4%</td>
<td>6%</td>
<td>46%</td>
<td>38%</td>
<td></td>
</tr>
</tbody>
</table>

Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)

Q. Please review the statements below and rate your personal level of agreement with each.
Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)

Q. Thinking about the clinical trials that your company conducts (for itself or on behalf of other organizations), which of the following best describes the adoption of DCT elements?

**Adoption of DCT Elements in Past 2 Years**

- Much more utilization of DCT elements than in previous years: 30%
- Somewhat more: 20%
- About the same: 36%
- Somewhat less: 9%
- Much less utilization of DCT elements than in previous years: 1%
- Don't know/NA: 4%

**Adoption of DCT Elements 2 Years from Now**

- Much more utilization of DCT elements than there is currently: 36%
- Somewhat more: 48%
- About the same: 3%
- Somewhat less: 1%
- Much less utilization of DCT elements than there is currently: 0%
- Don't know/NA: 0%
Perceptions of Clinical Trial Participants

Influence on Decision to Participate in Clinical Trial

% indicating some/significant influence on decision to participate in trial

- Hope that the clinical trial treatment would improve their health/medical condition(s): 99%
- A doctor/healthcare professional suggests participation: 96%
- A friend or family member suggests participation: 96%
- Access to free healthcare: 94%
- Access to better doctors and hospitals than they would otherwise be able to use: 91%
- Compensation/payment for participation: 91%
- More contact with doctors/nurses than they would otherwise get: 86%
- Opportunity to contribute to science: 84%
- Curiosity about the product/treatment being researched: 76%
- Opportunity to learn more about health/medical condition(s): 76%
- Ability to participate remotely using devices/technology: 74%
- Opportunity to take part in a trial that is seeking a diverse population of participants: 44%
- Curiosity about how clinical trials work: 38%

Compliance with Protocol

- Strictly follow all of the instructions with no or little deviation: 6%
- Mostly follow all of the instructions: 16%
- Only follow some of the instructions: 78%

Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)

Q. We understand that there are many reasons why people decide to participate in clinical research trials. Please review the list of possible reasons below and for each, indicate the extent to which you believe these are influential to patients when deciding whether or not to participate in a clinical trial. Q. Based on your opinions and experience in the industry, which of the following best describes the extent to which you believe patients comply with clinical trial protocols?
Perceptions of Clinical Trial Sites

**Influence on Decision to Participate in Clinical Trial**

*% indicating some/significant influence on decision to participate in trial*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to bring new/better treatments to patients</td>
<td>99%</td>
</tr>
<tr>
<td>Desire to contribute to the advancement of field/science</td>
<td>99%</td>
</tr>
<tr>
<td>Curiosity/interest in the new treatment being researched</td>
<td>99%</td>
</tr>
<tr>
<td>Desire to stay up-to-date on treatments in specialty area</td>
<td>98%</td>
</tr>
<tr>
<td>Build site reputation for having innovative treatment/approach</td>
<td>98%</td>
</tr>
<tr>
<td>Compensation for participation</td>
<td>94%</td>
</tr>
<tr>
<td>Attract new patients to the practice</td>
<td>76%</td>
</tr>
<tr>
<td>Ability to use technology/devices (such as tablets and wearables) to reduce amount of in-person visits/procedures with participants</td>
<td>71%</td>
</tr>
<tr>
<td>Opportunity to participate in research that is seeking a diverse patient population</td>
<td>61%</td>
</tr>
</tbody>
</table>

**Compliance with Protocol**

- Strictly follow all of the instructions with no or little deviation: 8%
- Mostly follow all of the instructions: 21%
- Only follow some of the instructions: 71%

Base: N=80 Sponsor/Provider Sample (who have ever conducted clinical trial)

Q. We understand that there are many reasons why sites decide to participate in clinical research trials. Please review the list of possible reasons below and for each, indicate the extent to which you believe each is influential in a site’s decision to participate in a clinical trial. Q. Based on your opinions and experience in the industry, which of the following best describes the extent to which you believe investigative sites comply with clinical trial protocols?
Additional Analysis

Patients
Sample Composition (National Sample)

Gender
- Male: 48%
- Female: 52%
- Non-binary: 1%

Ethnicity
- White/Caucasian: 79%
- African/African Descent: 14%
- Asian-American/Asian: 5%
- American Indian/Alaska Native: 2%
- Hispanic: 12%
- Other: 2%

Age
- 18 to 29: 21%
- 30 to 39: 20%
- 40 to 49: 15%
- 50 to 59: 18%
- 60 to 69: 18%
- 70+: 9%

Household Income
- Under $25k: 19%
- $25k up to $50k: 22%
- $50k up to $75k: 20%
- $75k up to $100k: 15%
- $100k or more: 25%

Education
- HS Grad or Less: 33%
- Some education beyond HS: 27%
- College grad: 26%
- Advanced degree: 15%

Employment Status
- Work FT: 46%
- Work PT: 13%
- Family/home care: 3%
- Student: 4%
- Unemployed: 11%
- Retired: 25%

Insurance Coverage
- Private: 34%
- Medicare: 28%
- Medicaid: 22%
- Other Healthcare: 9%
- VA/CHAMPUS: 5%
- Other: 3%
- Don’t know: 4%
- None: 10%
- Prefer not to answer: 2%

Region
- Northeast: 44%
- Midwest: 22%
- South: 16%
- West: 19%

Base: N=200 Respondents from National Sample
**Health Profile (National Sample)**

**Overall Health**

- Excellent: 4%
- Good: 16%
- Fair: 27%
- Poor: 54%

**Presence of Medical Conditions**

- Chronic: A condition or issue that is always present: 33%
- Episodic: A condition or issue that comes and goes: 21%
- Temporary: A condition or issue that you expect will go away completely: 19%
- Degenerative: A condition or issue that gets worse over time: 17%
- None: I do not have any medical conditions or issues: 34%

**Impact of Conditions on Quality of Life**

- Severe: 8%
- Moderate: 12%
- Mild: 36%
- No Impact: 45%

**Participation in Clinical Trial**

- I have personally participated in a clinical trial: 8%
- I have a family member who has participated in a clinical trial: 10%
- I have a friend or acquaintance who has participated in a clinical trial: 11%
- None of the above apply: 75%

Base: N=200 Respondents from National Sample
## Agree/Disagree Statements (National Sample)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Somewhat disagree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that participating in a clinical trial would help to develop new and better treatments for the people that need them.</td>
<td>3%</td>
<td>17%</td>
<td>41%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Healthcare professionals working on clinical trials carefully monitor the well-being of participants.</td>
<td>3%</td>
<td>7%</td>
<td>23%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>I believe that companies who conduct clinical trials strive to have a diverse population of participants.</td>
<td>3%</td>
<td>4%</td>
<td>26%</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>Clinical trials are designed to look at the possible benefits and risks of drugs and vaccines in an honest, unbiased way.</td>
<td>25%</td>
<td>5%</td>
<td>25%</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>I would trust a healthcare professional in a clinical trial to have my best interest in mind.</td>
<td>4%</td>
<td>5%</td>
<td>27%</td>
<td>39%</td>
<td>26%</td>
</tr>
<tr>
<td>I would be open to participating in a clinical trial for an experimental treatment (in other words, a treatment that is thought to offer benefits, but has not yet been proven).</td>
<td>5%</td>
<td>10%</td>
<td>27%</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>The data and results of clinical trials are reported accurately and in an unbiased way.</td>
<td>4%</td>
<td>6%</td>
<td>28%</td>
<td>40%</td>
<td>23%</td>
</tr>
<tr>
<td>Clinical trials are designed with participants in mind.</td>
<td>4%</td>
<td>9%</td>
<td>31%</td>
<td>37%</td>
<td>21%</td>
</tr>
<tr>
<td>I believe the care and treatment I'd receive in a clinical trial would be better than that I could get on my own.</td>
<td>4%</td>
<td>9%</td>
<td>40%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>I believe clinical trials only benefit the pharmaceutical companies that run them.</td>
<td>14%</td>
<td>22%</td>
<td>29%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>I don't believe that a healthcare professional in a clinical trial would take the time to really understand my wants and needs as it relates to quality of life/lifestyle.</td>
<td>14%</td>
<td>27%</td>
<td>35%</td>
<td>18%</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Base:** N=200 Respondents from National Sample

*Q. Please review the statements below and rate your personal level of agreement with each.*
Q. If you were interested in learning more about a clinical trial, which of the following would you consider to be your top three trusted sources of information? Please click or drag and drop the source you consider “most trusted” and so on.

**Trusted Sources of Info on Clinical Trials (National Sample)**

- Your regular doctor/healthcare professional:
  - Most trusted: 48%
  - Next most trusted: 32%
  - Third most trusted: 11%
  - Total % ranking as top 3 trusted source: 90%

- Patient advocacy group:
  - Most trusted: 35%
  - Next most trusted: 26%
  - Third most trusted: 10%
  - Total % ranking as top 3 trusted source: 70%

- Government-run website for clinical trials (Clinicaltrials.gov):
  - Most trusted: 28%
  - Next most trusted: 20%
  - Third most trusted: 17%
  - Total % ranking as top 3 trusted source: 64%

- Family member/friend:
  - Most trusted: 25%
  - Next most trusted: 20%
  - Third most trusted: 17%
  - Total % ranking as top 3 trusted source: 62%

Base: N=200 Respondents from National Sample
## Impact of Trial “Benefits” on Interest in Participating (National Sample)

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Very/somewhat negative impact</th>
<th>No impact</th>
<th>Very/somewhat positive impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>You would be able to receive all of your personal data and results from the clinical trial, to keep for your records and/or to share with your own doctor</td>
<td>5%</td>
<td>22%</td>
<td>73%</td>
</tr>
<tr>
<td>You would be provided with transportation and/or reimbursement for any in-person clinical trial appointments</td>
<td>6%</td>
<td>24%</td>
<td>71%</td>
</tr>
<tr>
<td>You would be able to see your regular or preferred doctor for clinical trial visits rather than someone affiliated with the clinical trial (who you do not have a relationship with)</td>
<td>4%</td>
<td>27%</td>
<td>70%</td>
</tr>
<tr>
<td>You would be able to communicate with other trial participants in an anonymous way to discuss the trial experience</td>
<td>4%</td>
<td>32%</td>
<td>64%</td>
</tr>
<tr>
<td>Clinical trial professionals provided you with a smart device that you don’t typically use to track data (and that you would return at the end of the study)</td>
<td>8%</td>
<td>32%</td>
<td>61%</td>
</tr>
<tr>
<td>Clinical trial professionals only need to access your existing health records (no other involvement required)</td>
<td>9%</td>
<td>32%</td>
<td>60%</td>
</tr>
<tr>
<td>The trial only required me to provide specific information about my health (no other involvement required)</td>
<td>9%</td>
<td>34%</td>
<td>58%</td>
</tr>
<tr>
<td>Visits with clinical trial professionals are conducted virtually (for example, using Zoom or FaceTime), rather than in-person</td>
<td>12%</td>
<td>32%</td>
<td>57%</td>
</tr>
<tr>
<td>Clinical trial professionals would be able to access data from smart devices that you already use (such as a phone or smart watch)</td>
<td>16%</td>
<td>30%</td>
<td>55%</td>
</tr>
<tr>
<td>You would be provided with childcare and/or reimbursement for childcare so that you may participate in clinical trial appointments</td>
<td>5%</td>
<td>51%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Base: N=200 Respondents from National Sample

Q. Please review the list of possible clinical trial options below and for each, indicate the extent to which it would have an impact on your decision to participate in a clinical trial.
Clinical Trial Experience Among Participants

**Participant Status**
- Healthy Volunteer: 32%
- Patient: 68%

**Product Under Investigation**
- Medication/treatment: 40%
- Vaccine: 29%
- Medical device: 4%
- Other: 25%
- Can't remember: 2%

**Compliance with Protocol**
- Strictly followed all of the instructions with no or little deviation: 17%
- Mostly followed all of the instructions: 81%
- Only followed some of the instructions: 2%

**Influence on Decision to Participate in Clinical Trial**
- Opportunity to contribute to science: 90%
- Curiosity about the product/treatment being researched: 83%
- Opportunity to learn more about health/medical condition(s): 69%
- Hope that the clinical trial treatment would improve my health/medical condition(s): 54%
- Compensation/payment for participation: 48%
- Curiosity about how clinical trials work: 42%
- Access to free healthcare: 33%
- Ability to participate remotely using devices/technology: 33%
- A friend or family member suggested I participate: 27%
- A doctor/healthcare professional suggested I participate: 25%
- More contact with doctors/nurses than I would otherwise get: 21%
- Access to better doctors and hospitals than I would otherwise be able to use: 21%

Base: N=48 Participants in Clinical Trials

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Clinical Trial Experience Among Participants (Continued)

Ratings of Patient Experience

<table>
<thead>
<tr>
<th>Statement</th>
<th>% indicating they somewhat/strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>It was easy to follow the instructions/directions I was given as part of the clinical trial</td>
<td>96%</td>
</tr>
<tr>
<td>I feel that the time I spent participating in this clinical trial was worthwhile</td>
<td>85%</td>
</tr>
<tr>
<td>I liked the healthcare professionals that I dealt with as part of this clinical trial</td>
<td>80%</td>
</tr>
<tr>
<td>The trial stayed on timeline, and started and finished as planned</td>
<td>76%</td>
</tr>
<tr>
<td>The tests and procedures I was required to do were consistent with my expectations</td>
<td>72%</td>
</tr>
<tr>
<td>The amount of time that I spent participating in the trial met my expectations</td>
<td>72%</td>
</tr>
<tr>
<td>I learned something about clinical trials by participating in this research</td>
<td>65%</td>
</tr>
<tr>
<td>My compensation was accurate and received in a timely manner</td>
<td>63%</td>
</tr>
<tr>
<td>I did not experience any sickness or other feelings of being unwell as a result of my participation in the clinical trial</td>
<td>61%</td>
</tr>
<tr>
<td>The technology/devices I was asked to use were user-friendly</td>
<td>48%</td>
</tr>
<tr>
<td>I learned something about my health/medical condition(s) by participating in this research</td>
<td>39%</td>
</tr>
<tr>
<td>I felt that the healthcare professionals I worked with offered better care and/or more expertise than I would get otherwise</td>
<td>35%</td>
</tr>
<tr>
<td>I saw improvement in my health/medical conditions as a result of my participation in the clinical trial</td>
<td>26%</td>
</tr>
<tr>
<td>I had more access to healthcare professionals as a result of my participation in this clinical trial</td>
<td>26%</td>
</tr>
</tbody>
</table>

Likelihood to Participate Again

- 50% Definitely would participate
- 40% Probably would participate
- 8% Might or might not participate
- 2% Probably would not participate
- 2% Definitely would not participate

Base: N=46/48 Participants in Clinical Trials

Q. Based on your personal experience, please read the statements below and indicate your level of agreement with each.

Q. All things considered, based on your personal experience participating in clinical trials, how likely would you be to participate in another clinical trial in the future?
Trial Naïve Respondents

Ever Asked to Participate in Trial

- 16% Yes, I have been asked to participate as a healthy volunteer
- 8% Yes, I have been asked to participate as a patient
- 77% No, I have never been asked to participate in a clinical trial

Concerns About Participating in a Clinical Trial

% indicating have some/significant concern

- I would feel sick/unwell as a result of participating: 86%
- Type of tests/procedures required: 83%
- Number of tests/procedures required: 80%
- I would not see any improvement in my health/medical condition as a result of participating: 73%
- Compensation/payment would not be given as expected: 72%
- Time commitment/time taken out of your life: 72%
- Information/health data would not be private: 70%
- I could receive a placebo or other treatment that is not the treatment being researched: 69%
- I might not like the healthcare professionals I have to deal with as part of the clinical trial: 67%
- Would be difficult to comply/adhere to instructions: 61%
- Would be difficult to understand the trial instructions: 59%
- Technology/devices would be difficult to use: 57%
- I would feel sick/unwell as a result of participating: 86%
- Type of tests/procedures required: 83%

Base: N=184 Respondents from National Sample (never participated in clinical trial)
Trial Naïve Respondents (Continued)

**Likelihood to Participate in Clinical Trial in the Future**

- **Definitely would participate**: 20%
- **Probably would participate**: 31%
- **Might or might not participate**: 37%
- **Probably would not participate**: 8%
- **Definitely would not participate**: 4%

**Influence on Decision to Participate in Clinical Trial**

% indicating some/significant influence on decision to participate in trial

- Hope that the clinical trial treatment would improve your health/medical condition(s): 89%
- Compensation/payment for participation: 88%
- Opportunity to learn more about health/medical condition(s): 84%
- Opportunity to contribute to science: 83%
- Curiosity about the product/treatment being researched: 82%
- Access to better doctors and hospitals than you would otherwise be able to use: 80%
- A doctor/healthcare professional suggested you participate: 79%
- Ability to participate remotely using devices/technology: 79%
- Access to free healthcare: 76%
- Curiosity about how clinical trials work: 70%
- More contact with doctors/nurses than you would otherwise get: 68%
- A friend or family member suggested you participate: 66%

Base: N=184 Respondents from National Sample (never participated in clinical trial)