



# Optimizing Clinical Development Rol: Trends, Challenges, and Opportunities in Patient Recruitment

June 2024: Complimentary Abstract / Table of Contents

Market Report  
Life Sciences Business Process

 Everest Group®

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# Background of research

Patient recruitment remains a complex and dynamic aspect of clinical trial management, requiring proactive strategies, collaboration, and innovation to overcome challenges and achieve enrollment targets. Patient recruitment is a critical component of clinical trials, yet it often presents significant challenges that can impact study timelines, costs, and overall success. By adopting patient-centric approaches, leveraging technology, and fostering collaboration across stakeholders, organizations can enhance recruitment efficiency, accelerate study timelines, and ultimately bring new treatments to market more quickly for the benefit of patients worldwide.

The future of patient recruitment in clinical trials is poised for significant evolution driven by technological advancements, changing regulatory landscapes, and shifting patient expectations. Outsourcing patient recruitment to specialized firms offers enterprises and Contract Research Organizations (CROs) opportunities to

leverage expertise, scalability, and flexibility in navigating the complexities of enrollment.

This report aims to address the challenges and how new technological solutions provide a breakthrough in the overall patient recruitment landscape, and what it entails for sponsors and service providers.

## We focus on:

- An overview of the patient recruitment landscape including the current roadblocks faced by sponsors
- We deep-dive into the current state of the supplier ecosystem (CROs, IT/BPOs, and specialists) and try to understand the sourcing criteria for enterprises in selecting suppliers for patient recruitment outsourcing
- Finally, we explore the role of technology in solving the major challenges faced in patient recruitment

## Scope of this report

**Geography:** Global

**Industry:** Life sciences (biopharma and medical devices)

**Services:** Life Sciences BPS, Life Sciences ITS, Clinical Development Technology

# Overview and abbreviated summary of key messages

This report aims to address the challenges and how new technological solutions provide a breakthrough in the overall patient recruitment landscape, and what it entails for sponsors and service providers.

## **Some of the findings in this report, among others, are:**

### Major challenges faced by life sciences enterprises

- As R&D stands at an inflection point, accelerating efficiency in patient recruitment can drive productivity. However, sponsors are facing roadblocks in clinical trial recruitment
  - Geography-based challenges
  - Changing regulatory guidelines
  - Increasing number of clinical trials and trial complexity
  - Increasing need for inclusivity in clinical trials
  - Low patient awareness and pre-engagement

### Supplier ecosystem and sourcing considerations

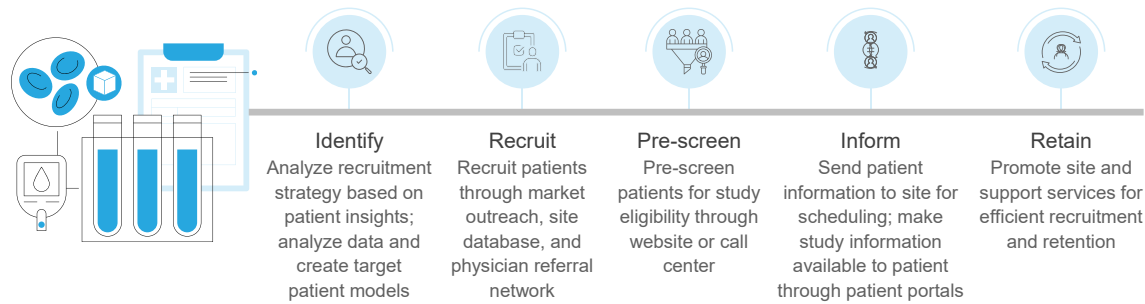
The supplier landscape consists of CROs that provide one-stop solutions, IT/BPOs with their technology prowess, and specialists who are focused on one or more domain areas

### Role of technology in patient recruitment

- Having the right technological platforms or point solutions can help sponsors solve recurring issues in coordination to improve patient identification and mapping
- Technological solutions offer a pathway to reducing barriers and improve diversity in clinical trials
- Creating a patient-centric model revolves around Real-world Data (RWD) and social media / search analytics, which presents enterprises with opportunities to widen their search for patients
- Enterprises are increasingly adopting Gen AI for clinical trials as it has the potential to advance patient recruitment and accelerate the development of new therapies and interventions

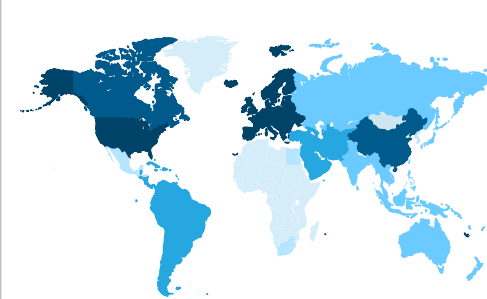
# This study offers 3 distinct chapters providing a deep dive into key aspects of patient recruitment services market; below are four charts to illustrate the depth of the report

## Everest Group's view of patient recruitment and enablement services



## Key challenges faced by enterprises in patient recruitment

Number of clinical trials conducted across the globe



The US and Europe account for the largest chunk of clinical trials worldwide. As trials spread to Asia and the Middle East, their cultural, linguistic, economic, and regulatory diversity pose significant challenges for trial conduct.

These challenges are amplified for investigator-initiated trials, which are less commercially driven, and typically lack the financial and specialized human resources of industry-sponsored trials.

There is also the challenge of finding qualified investigators and staff familiar with local regulations and cultures. In addition, many of the patients in the region may not be able to access healthcare or cannot afford treatment if they participate in a trial due to lack of access to healthcare.

## An overview of the supplier landscape including CROs, IT/BPOs, and specialists

Characteristic	Coverage strength			
	Low	Medium	High	
	<b>CROs</b>	<b>IT/BPOs</b>	<b>Life sciences specialists</b>	
			<b>Commercial specialists</b>	<b>Recruitment specialists</b>
Non-exhaustive examples				
Coverage across patient recruitment services	<ul style="list-style-type: none"> <li>Identify</li> <li>Recruit</li> <li>Pre-screen</li> <li>Inform</li> <li>Retain</li> </ul>	<ul style="list-style-type: none"> <li>Identify</li> <li>Recruit</li> <li>Pre-screen</li> <li>Inform</li> <li>Retain</li> </ul>	<ul style="list-style-type: none"> <li>Identify</li> <li>Recruit</li> <li>Pre-screen</li> <li>Inform</li> <li>Retain</li> </ul>	<ul style="list-style-type: none"> <li>Identify</li> <li>Recruit</li> <li>Pre-screen</li> <li>Inform</li> <li>Retain</li> </ul>

## Technological solutions offer a pathway to reducing barriers in clinical trials

**Economic barriers**  
 Prompt reimbursements and rewards for participation in clinical trials; remote monitoring to reduce minority patient burden through reduced need for visits; sponsor-provided tablets or smartphones with in-built trial management applications to allow for a virtual mode of trial conduct

**Linguistic barriers**  
 Design of consent forms in native languages and remote submission of eConsent; use of patient-facing applications in patients' regional languages; contact centers with native speakers to address patient issues and queries regarding trial progress

**Cultural barriers**  
 Matching of patients with physicians of the same culture and race during remote consultations

**Physical barriers**  
 Reducing frequency of visits through telemedicine and remote consultation applications; functionality to book rides from ride services companies directly from patient-facing applications for hassle-free travel to sites

**Trust barriers**  
 Sharing lay summaries and trial performance updates frequently and directly with patients through patient-facing applications; encouraging minority participation in clinical trials through in-app educative campaigns, promotional seminars with native influencers, and e-learning videos

# Research calendar

## Life Sciences Business Process

	Published	Current release	Planned
Reports title	Release date		
Navigating Economic, Geopolitical, and Regulatory Uncertainty in the Life Sciences Industry			April 2023
Life Sciences Sales and Marketing Operations – Provider Compendium 2023			June 2023
Life Sciences Operations PEAK Matrix® Assessment 2023			September 2023
Adapting Commercial Models for Success in the Life Sciences Industry			October 2023
MedTech Operations PEAK Matrix® Assessment 2023			November 2023
Life Sciences Operations – Provider Compendium 2024			February 2024
MedTech Operations – Provider Compendium 2024			March 2024
Life Sciences Enterprise Sourcing Considerations			May 2024
Regulatory and Medical Affairs Operations PEAK Matrix® Assessment 2024			May 2024
<a href="#">Optimizing Clinical Development Rol: Trends, Challenges, and Opportunities in Patient Recruitment</a>			June 2024
Generative AI in Life Sciences: Moving from Ideas to Operationalization			Q3 2024
Life Sciences AI and Analytics in Commercial PEAK Matrix® Assessment 2024			Q3 2024
Pharmacovigilance Operations PEAK Matrix® Assessment 2024			Q4 2024
Pharmacovigilance: State of the Market			Q4 2024
Pharmacovigilance Operations Provider Compendium 2024			Q4 2024
Clinical Data Management Operations PEAK Matrix® Assessment 2025			Q1 2025

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# Research calendar

## Clinical Development Technology

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Reports title	Release date		
Life Sciences Clinical Data and Analytics (D&A) Platforms PEAK Matrix® Assessment 2023			November 2023
Decentralized Clinical Trial Platforms PEAK Matrix® Assessment 2023 – Update			November 2023
<a href="#">Optimizing Clinical Development Rol: Trends, Challenges, and Opportunities in Patient Recruitment</a>			June 2024
Life Sciences Electronic Data Capture (EDC) Products PEAK Matrix® Assessment 2024			Q3 2024
Life Sciences Clinical Data and Analytics Platforms PEAK Matrix® Assessment 2024			Q3 2024
Life Sciences Clinical Trial Management System (CTMS) Products PEAK Matrix® Assessment 2024			Q3 2024
Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2024			Q4 2024

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