





# **2026 ANZ Site Landscape Survey**

**July 24, 2026**

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# Faculty Disclosure



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

**Jimmy Bechtel, SCRS**

**Sobia Dean, Paratus Clinical**

**Lucas Litewka, University of Sunshine Coast**



# 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.**



# A Smarter Trial Starts Here



**Jimmy Bechtel, MBA**

SCRS



**Lucas Litewka**

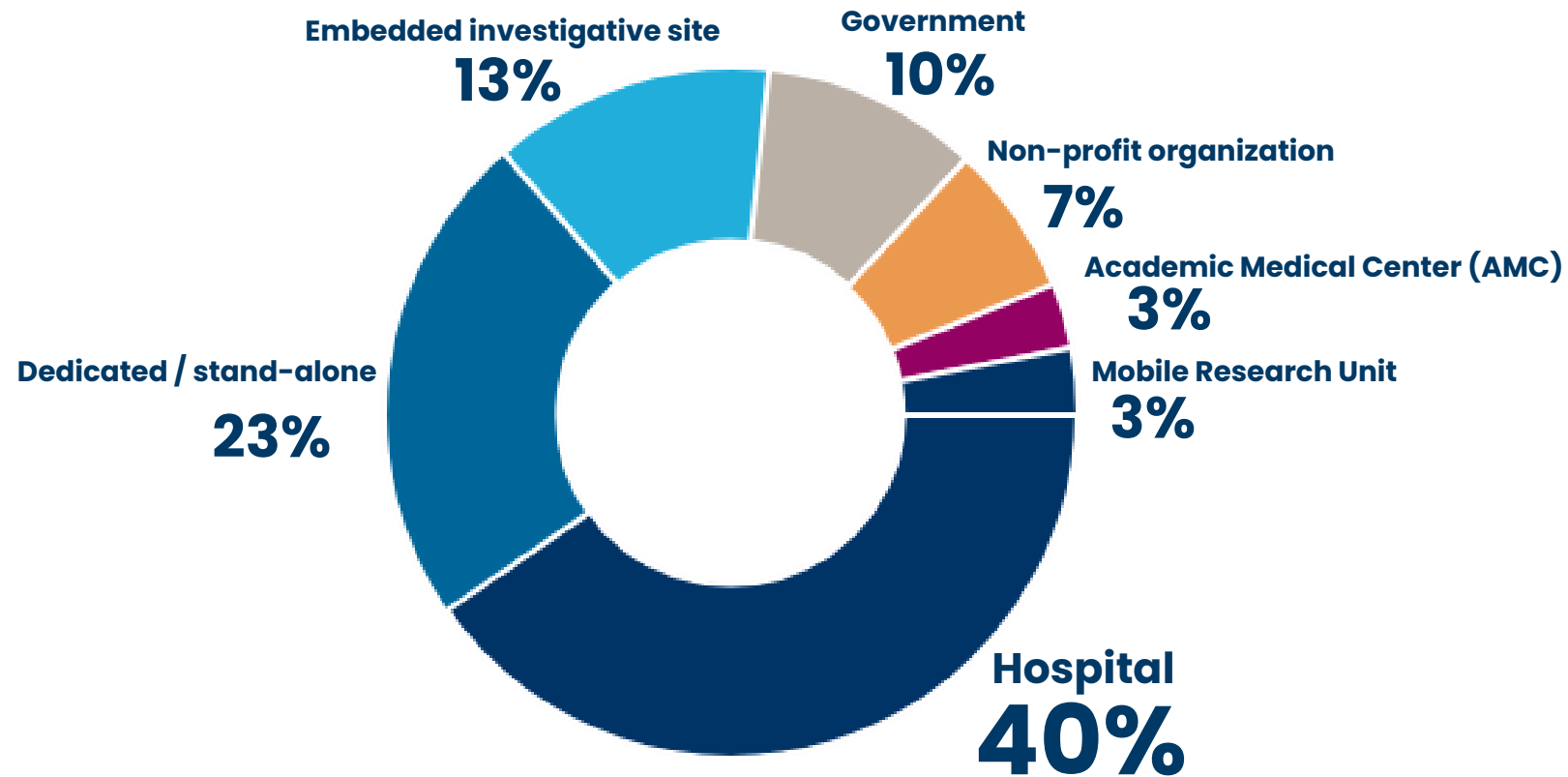
University of Sunshine Coast



**Sobia Dean, MPM**

Paratus Clinical

# Who's in the Room — ANZ Site Profile

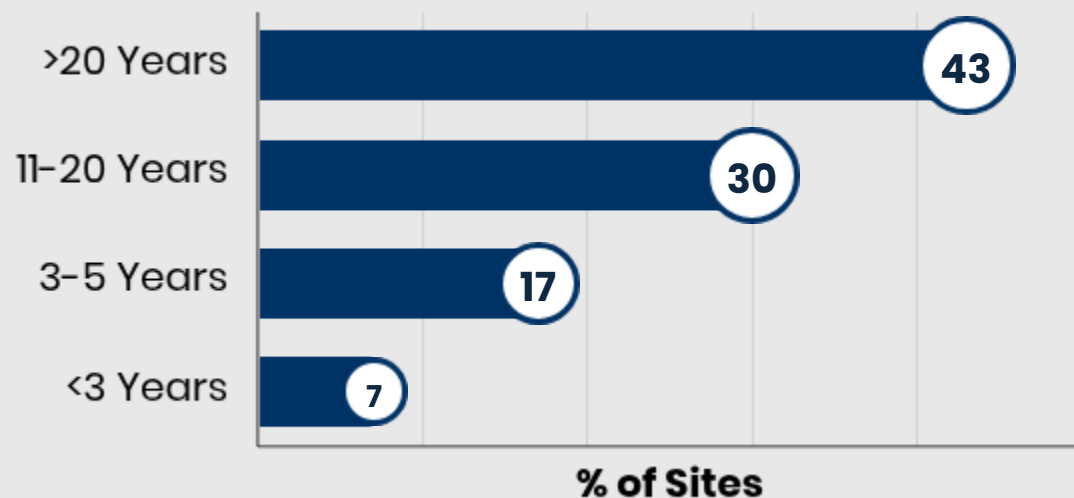


**ANZ's clinical research infrastructure is anchored by hospital-based programs, complemented by a strong base of dedicated and embedded investigative sites.**

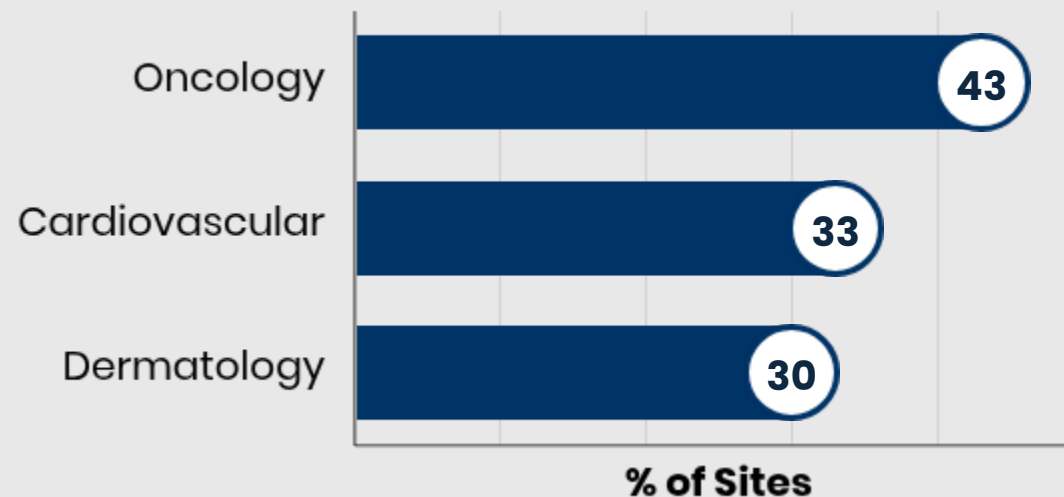
# Deep Experience, Broad Therapeutic Focus



## Years in Clinical Research



## Leading Therapeutic Areas



**Nearly three-quarters of ANZ sites have more than a decade of clinical trial experience, with oncology, cardiovascular, and a broad base of chronic and vaccine-related studies as core strengths. (Note: Therapeutic areas based on multi-select data.)**



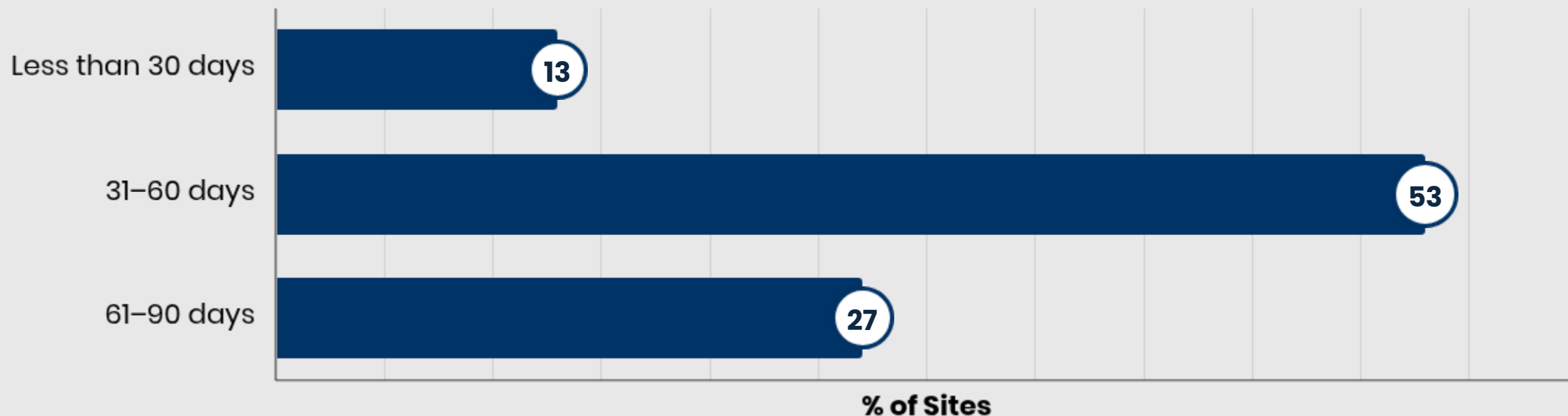
# Site Finances

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# How Long Contract & Budget Negotiations Really Take



## Typical Negotiation Timeline

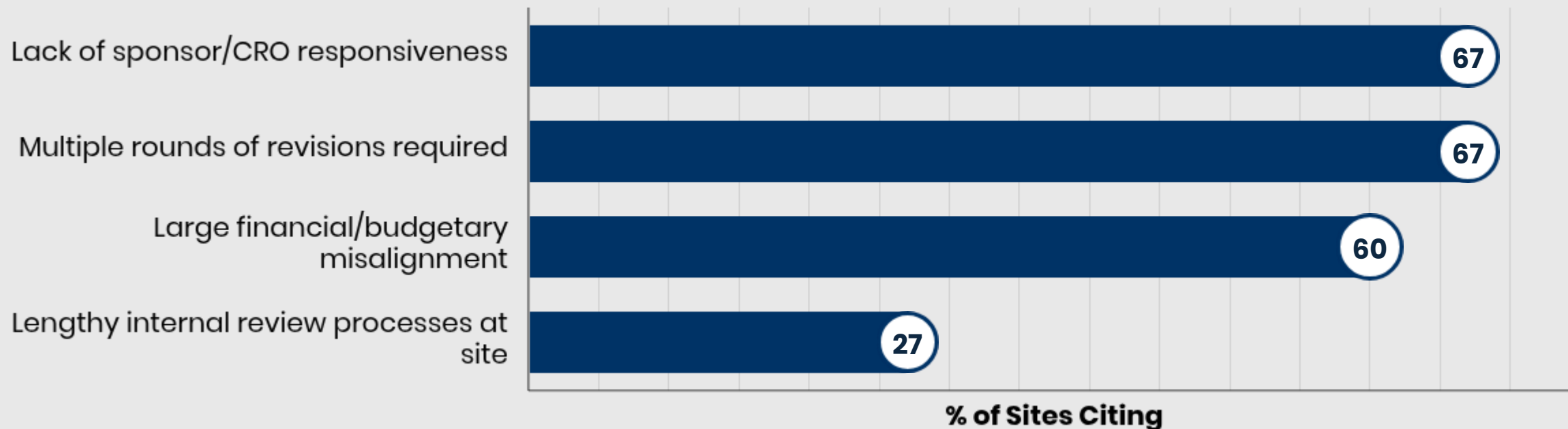


**Most sites take one to three months to finalize negotiations. With 60% of sites reporting stagnant budget adequacy, the process landscape remains stable but non-improving.**

# What's Really Slowing Negotiations Down



## Delay Factor



**Responsiveness and revision cycles are the most significant bottlenecks in clinical trial negotiations, cited by 67% of sites.**

# The Downstream Cost of Slow Negotiations

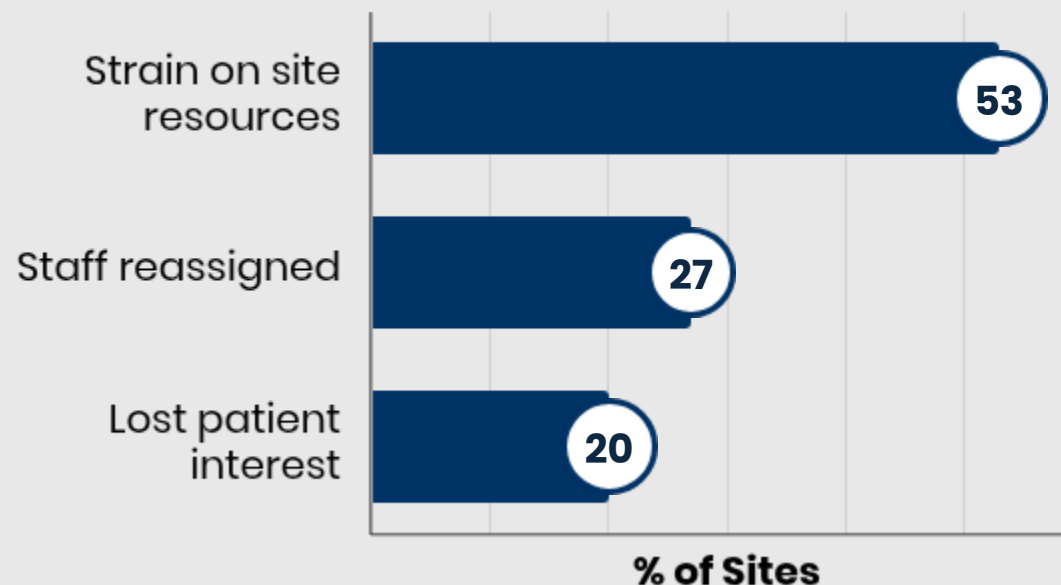


## Sites Reporting Delays

87%

of sites report delayed startup and enrollment

## Impact of Prolonged Negotiations

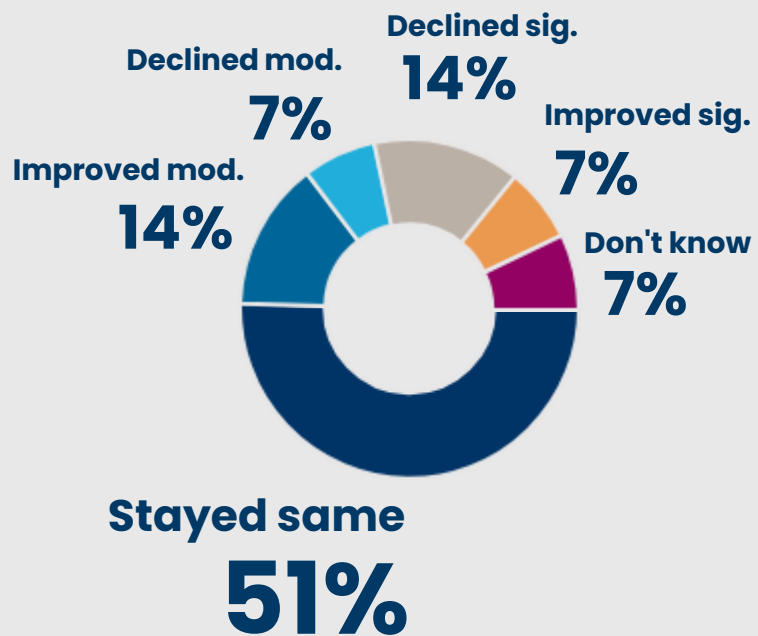


**Nearly 9 in 10 sites say prolonged negotiations directly delay study startup and enrollment — the clearest link in the entire survey between a process bottleneck and trial timelines.**

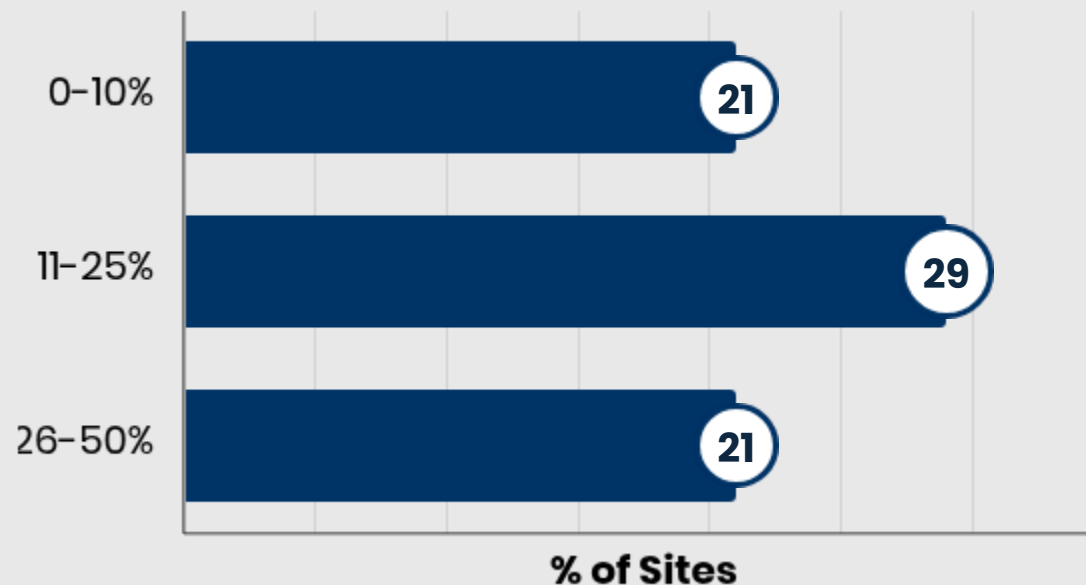
# Payment Timeliness & Receivables



## Payment Timeliness vs. 2024



## Share of AR 90+ Days Overdue



Payment timeliness has held steady for half of sites, but a meaningful share are carrying significant aged receivables — for some, more than a quarter of receivables sit past 90 days overdue.

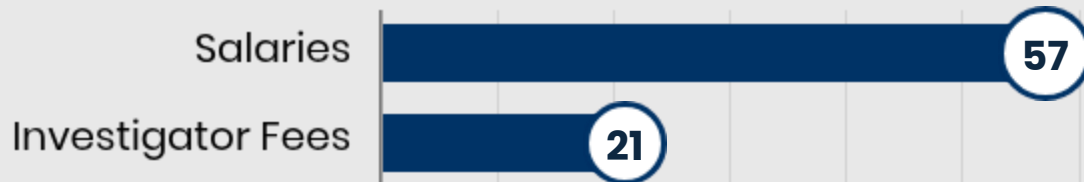
# Rising Costs & How Sites Are Responding



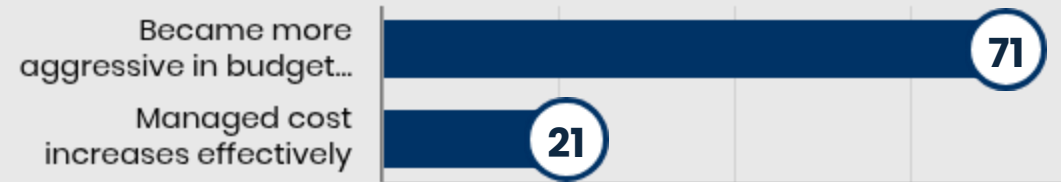
## Operating Cost Increase (2025 % of Sites)



## Leading Cost Driver (% of Sites)



## Site Response (% of Sites)



**Salaries are driving cost growth for most sites, and the primary response has been to negotiate harder rather than cut services — a sign sites are protecting operational quality even under cost pressure.**



# Operations

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# Study Volume Is Healthy and Growing



## Active Studies Managed per Month (2025 % of Sites)



## Change in New Study Opportunities (2025 vs. 2024 % of Sites)



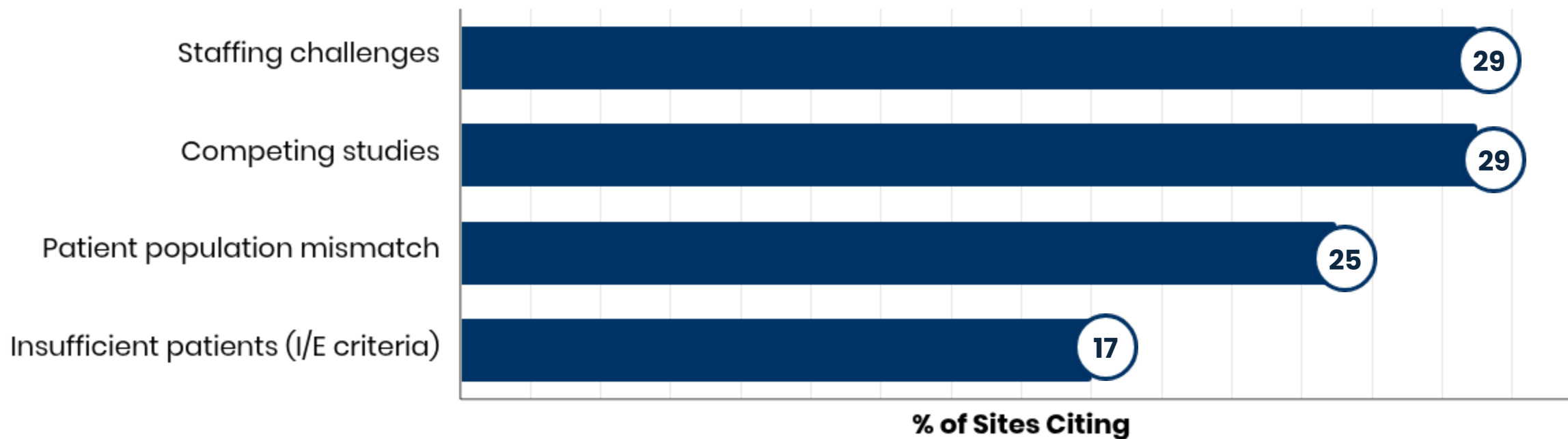
**Study opportunity flow into ANZ held steady or grew for most sites in 2025.**

# Why Sites Decline Trials: It's Capacity, Not Appetite



## Reason for Declining Trial

(Select Top 3)

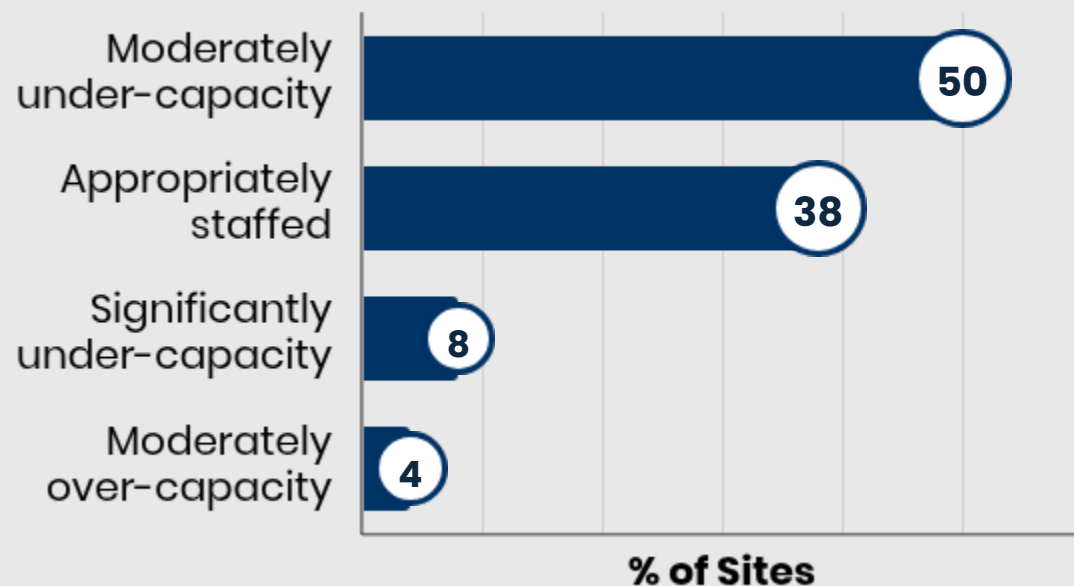


**Capacity, staffing, and patient availability are the primary drivers for trial rejection, far outweighing budget or lack of interest.**

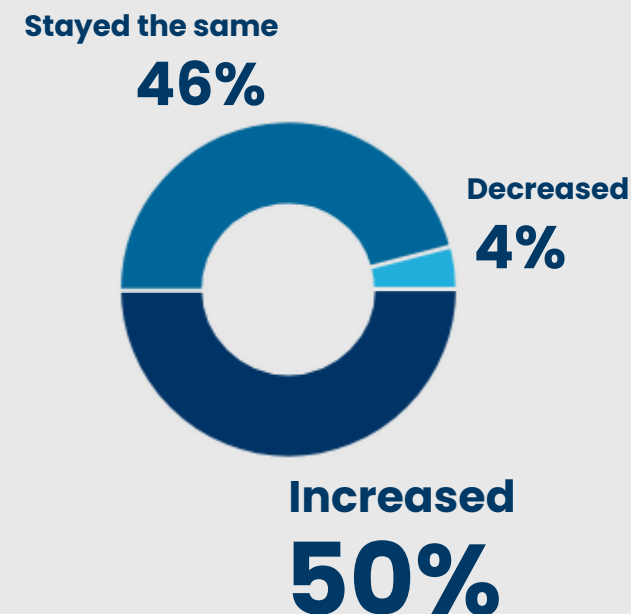
# Staffing — Stretched but Holding



## Staffing Capacity vs. Study Volume



## Change in Headcount (2025)

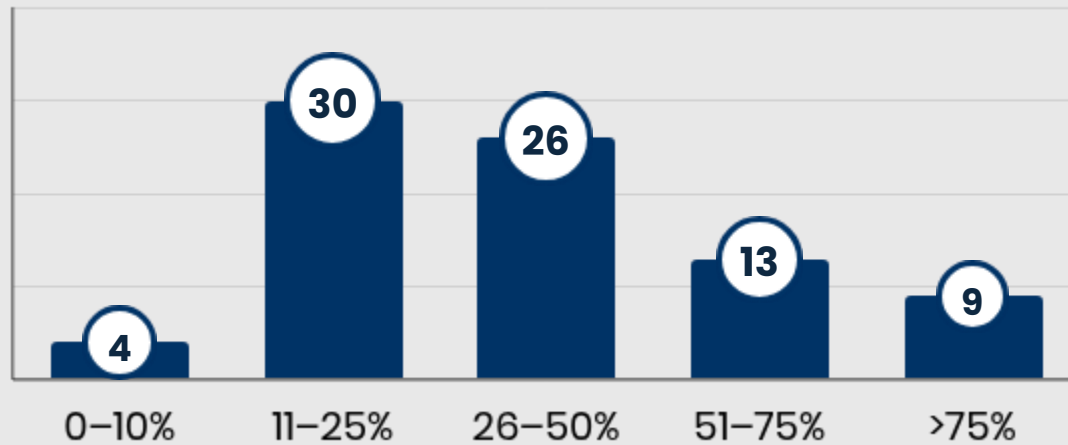


**Half of ANZ sites describe their staffing as stretched but manageable, and half grew headcount in 2025 — a workforce under pressure but actively investing rather than shrinking.**

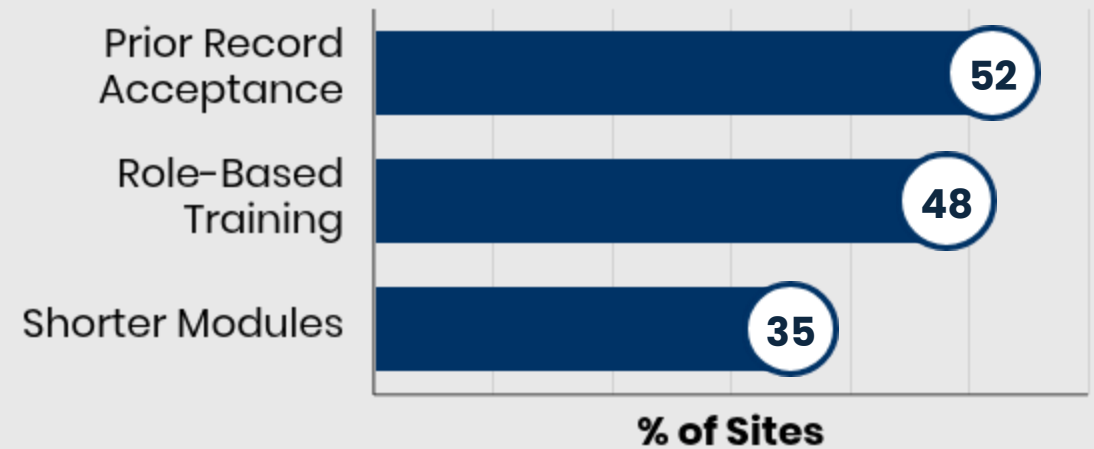
# Training Burden: A Redundancy Problem



## Share of Required Training Seen as Redundant (% of Sites)



## What Would Most Reduce Training Burden



**Nearly half of sites say at least a quarter of their required training repeats what staff already know. The fix sites want most isn't more money for training time — it's smarter, role-based design and acceptance of records already on file.**



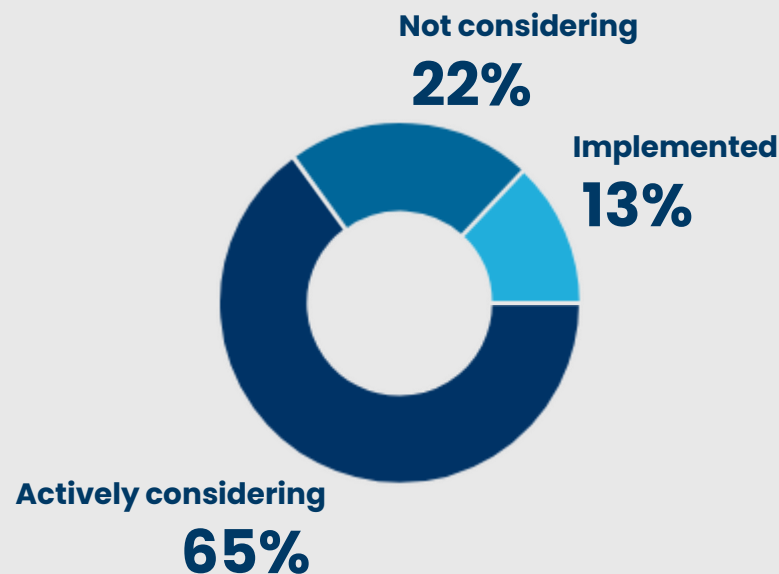
# Technology

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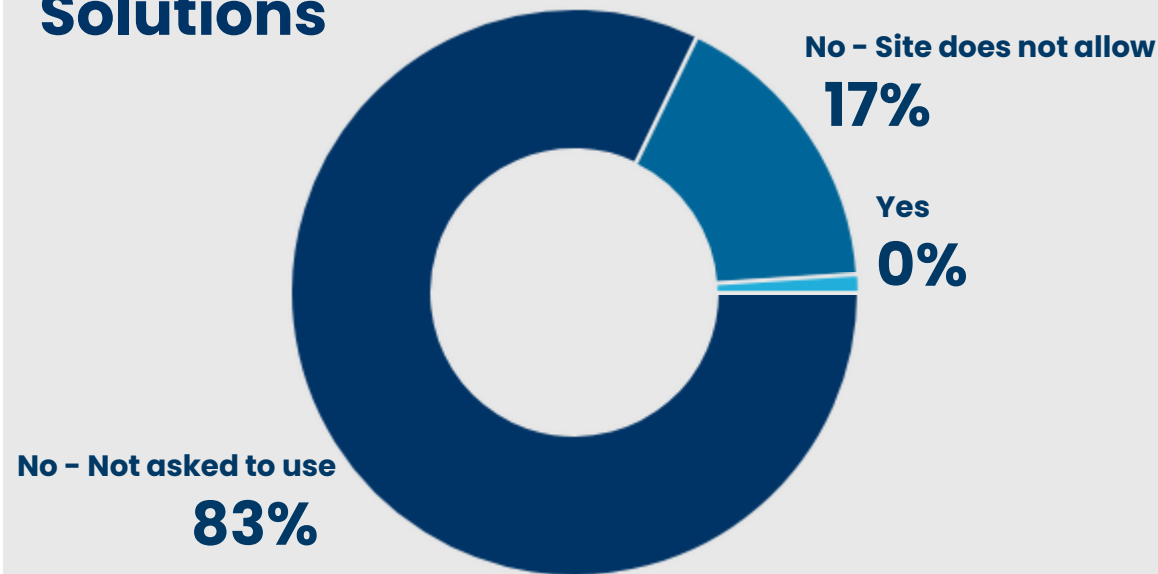
# AI Adoption — Curious, Not Yet Equipped



## Site-Led AI Adoption



## Sponsor/CRO-Provided AI Solutions

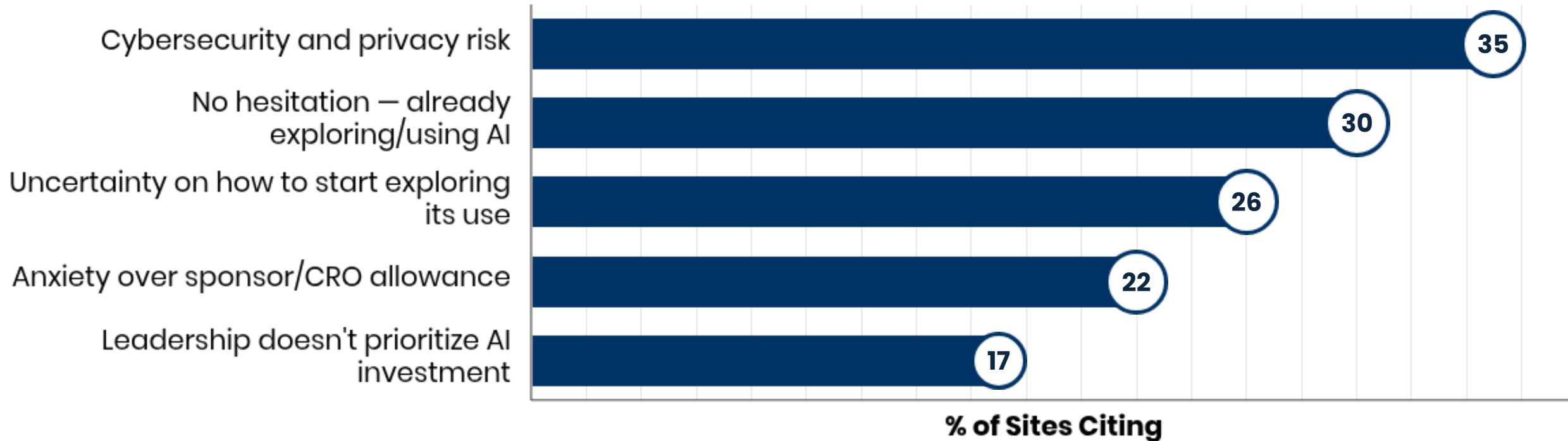


**Nearly two-thirds of ANZ sites are actively weighing independent AI adoption, while sponsor/CRO-provided AI tools have essentially not reached this market yet — the appetite is ahead of the infrastructure being offered.**

# What's Actually Holding AI Back



*Select Top 2 Reasons*

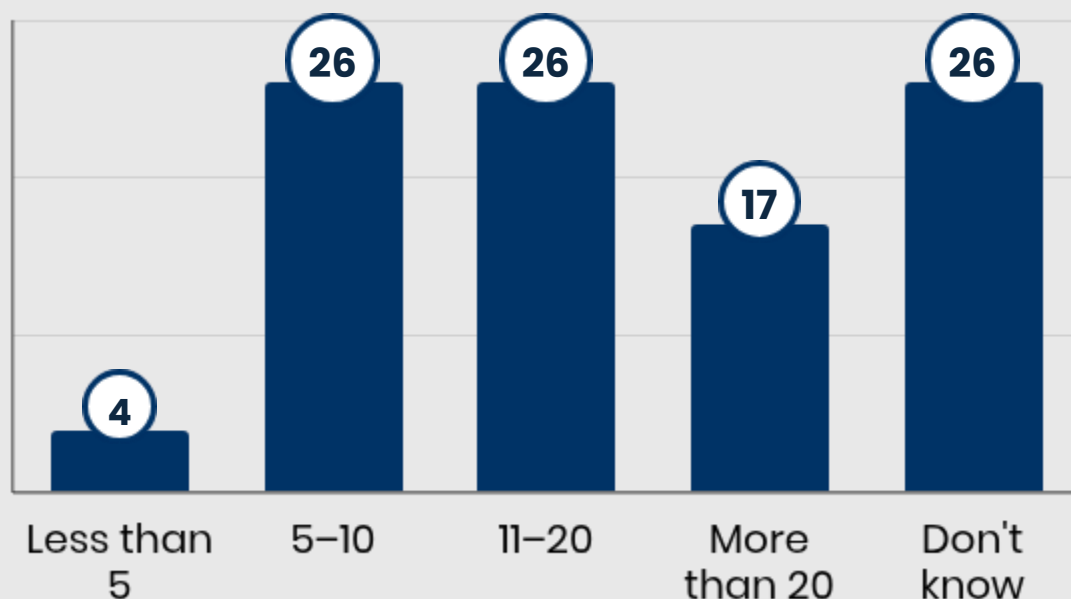


**The top barrier to AI adoption is security and privacy risk — not cost, culture, or leadership buy-in. This is a solvable, practical concern rather than an attitude problem.**

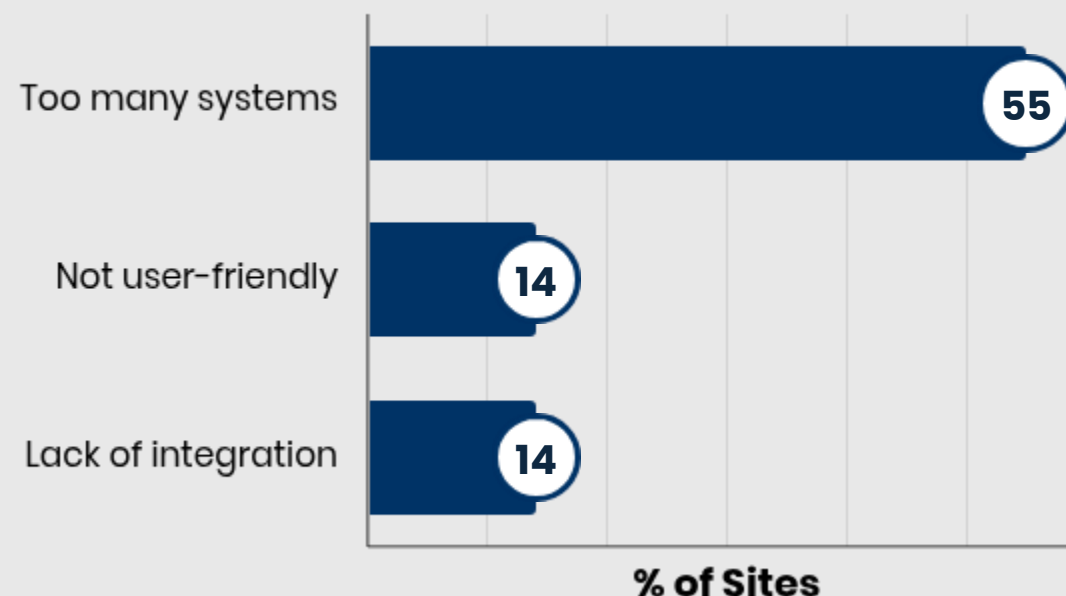
# Technology Complexity Is the Real Daily Pain Point



## Technology Systems in Active Use (% of Sites)



## Biggest Technology Challenge



**More than half of sites say system sprawl — not usability or cost — is their #1 technology challenge, and many are juggling more than 10 different platforms across active studies.**



# Relationships & Access

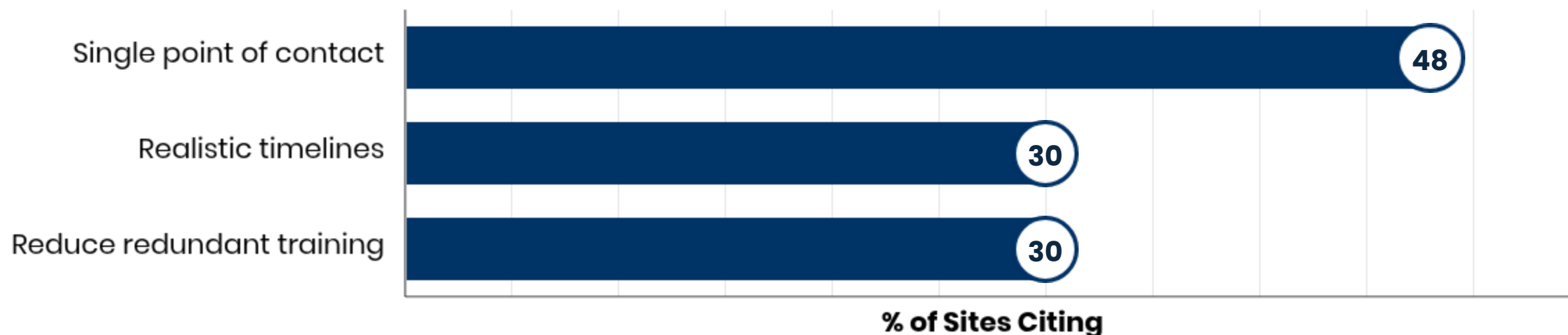
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# The #1 Ask of Sponsors and CROs



## Actions That Would Help Site Ops

(Select Top 3)

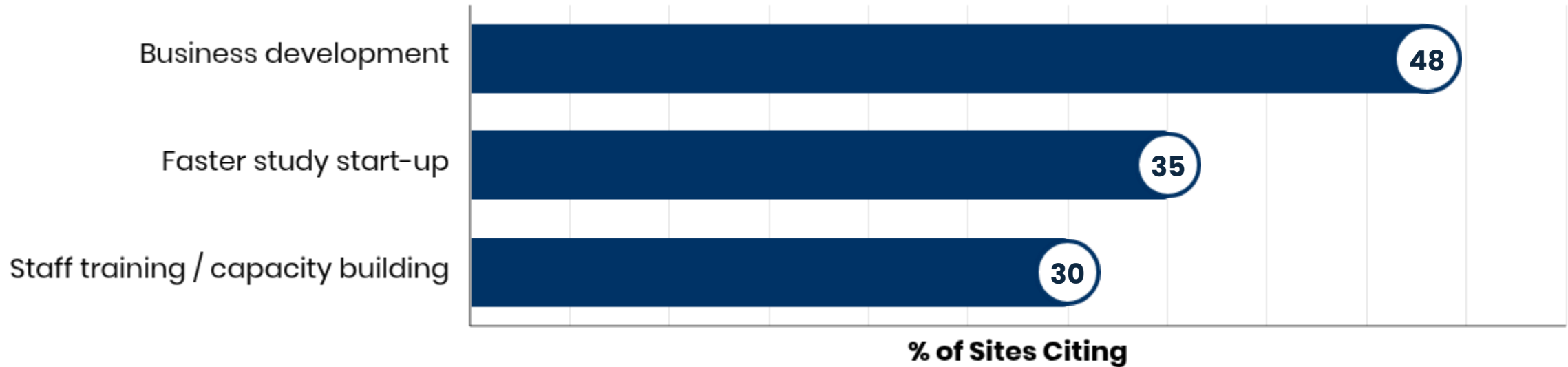


**When asked what one relationship change would most improve site operations, a single, consistent point of contact tops the list — well ahead of financial asks like payment terms or recruitment budgets.**

# Where Sites Are Focusing Their Own Priorities

## 2026 Organizational Priorities

(Select Top 3)

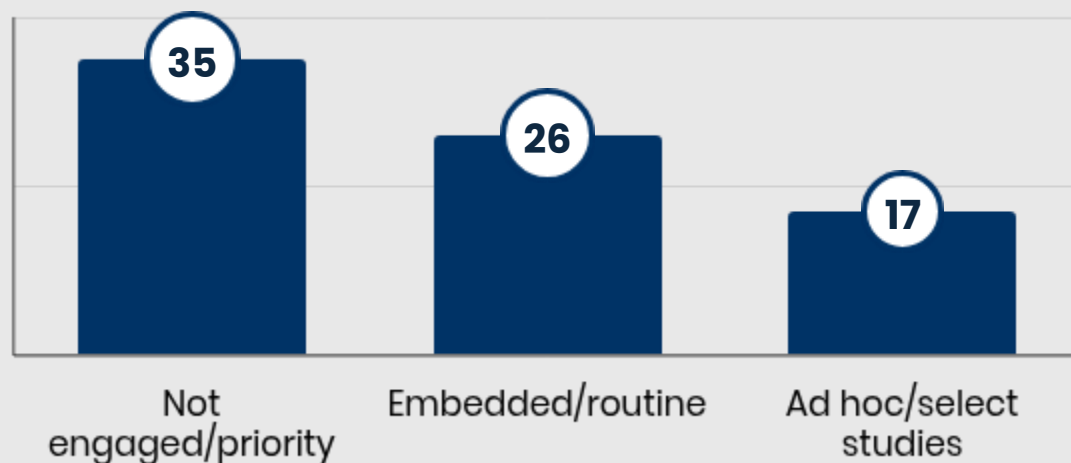


**Sites are prioritizing growth — business development leads every other priority — closely followed by speeding up study start-up and building staff capacity.**

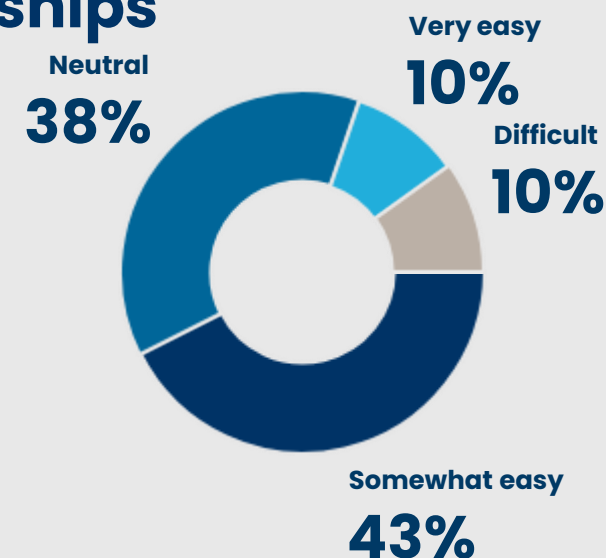
# Community & Patient Access Engagement



## Frequency of Community-Based Recruitment Outreach (% of Sites)



## Ease of Building Community Partnerships



**Community-based recruitment engagement is inconsistent across ANZ; approximately one-third of sites are not actively pursuing these strategies, while those who are report that the process remains resource-intensive even when relationships are established.**



# Outlook & Positioning

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# The Issues Sites Want the Industry to Solve



## Pressing Industry Issue (Next 2–3 Yrs)

(Select Top 3)



**Cost is the clear top-of-mind issue for the next 2–3 years, followed by protocol complexity and technology burden.**

# Where Innovation Investment Is Actually Going



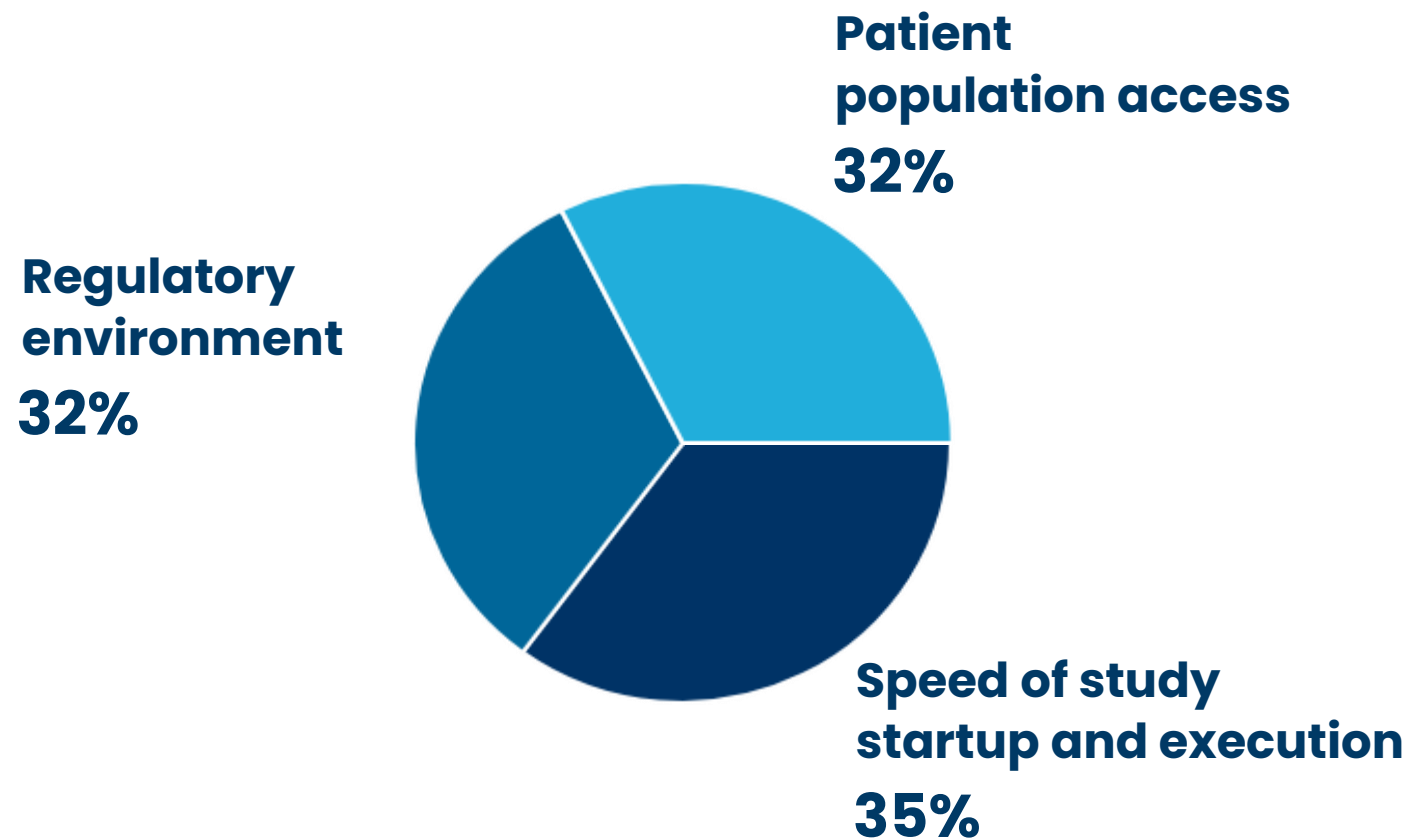
## Innovation Focus Area

(Select Top 3)



**Innovation dollars are prioritized toward finance and sponsor-site relationships—addressing primary pain points—while AI and decentralized models remain emerging rather than current primary focuses.**

# What Makes ANZ Competitive

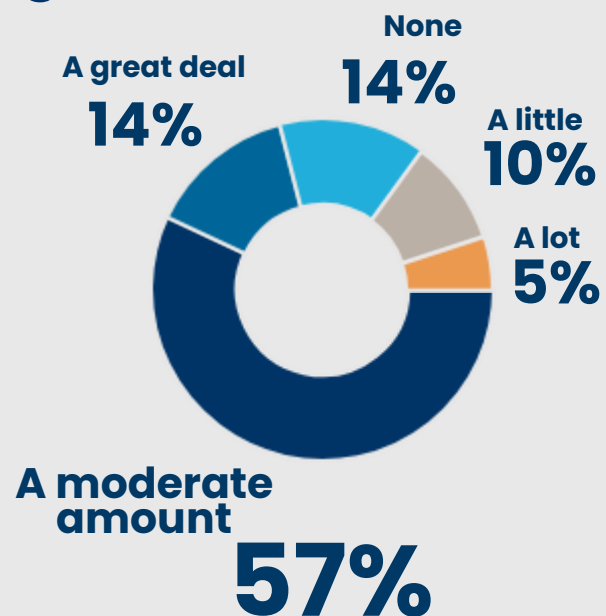


**Sites view the region's competitive edge as speed, regulatory clarity, and patient access—the classic case for choosing the region—all cited by roughly half of respondents or more.**

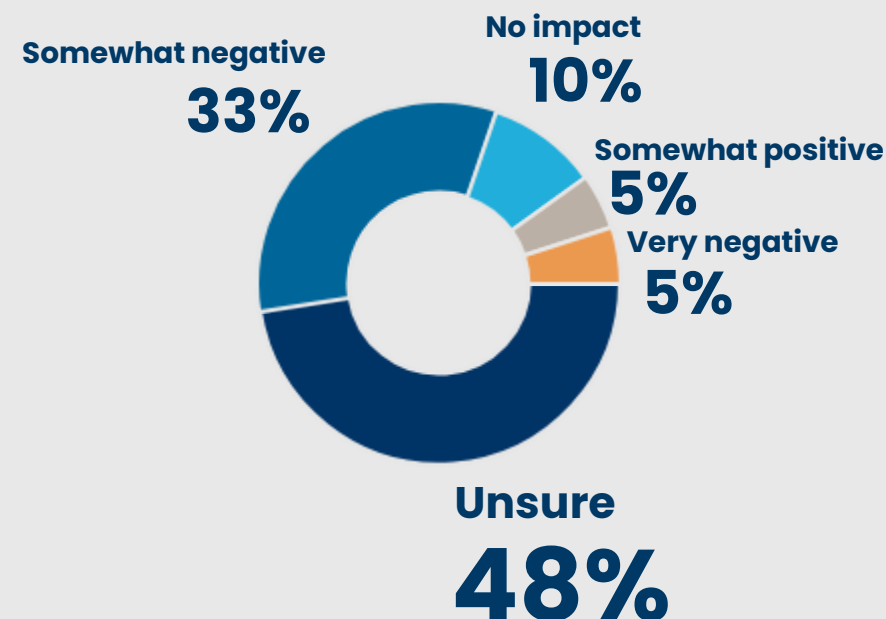
# A Region With an Edge — and Real Awareness of Global Pressure



## Concern Level: Trials Moving to Other Regions



## Effect of Current U.S. Research Climate



**Despite ANZ's strong competitive position, the large majority of sites are at least moderately concerned about trials shifting to other regions, and global dynamics are already being felt or watched closely.**



# WELCOME TO OUR ANZ SCRS MEMBERS!

Aotearoa Clinical Trials  
Austin Cancer Clinical Trials  
Austin Health  
Barwon Health  
Border Medical Oncology Research Unit  
Cerulea Clinical Trials  
Emeritus Research  
Flinders Medical Centre  
Gallipoli Medical Research  
Grampians Health  
Griffith University Clinical Trial Unit  
Ingham Institute for Applied Medical Research  
Life Clinical Research

Macquarie University Clinical Trials Unit  
Monash Health  
Murdoch Children's Research Institute  
Optimal Clinical Trials  
Paratus Clinical  
Ramsay Health Care  
Royal Adelaide Hospital  
Sunshine Coast University Hospital  
Talisman Health Research  
Te Pūriri o Te Ora  
TrialsWest  
Veritus Research  
Waitemata Clinical Research



