



2025 WCG CenterWatch

# Global Site Relationship Survey Report

Industry Results



# Introduction & Methodology

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- »» Create set of attributes to assess the working relationship between sites and sponsors.
- »» Identify geographic or characteristic site information associated with higher/lower satisfaction.
- »» Determine the global reputation of sponsors.
- »» Evaluate company performance within a defined benchmarking framework.
- »» Identify areas of company performance with statistical significance relative to Industry.
- »» Quantify the impact of site type, therapeutic area, trial volume, and other characteristic information.
- »» Identify areas of strength and opportunities for improvement.

## 2025 WCG CenterWatch Global Site Relationship Survey Summary

- »» The 2025 Global Site Relationship Survey builds upon earlier survey versions and was crafted with direct contributions from sites, sponsors, and CROs.
- »» This survey was deployed on January 20th, 2025, targeting site contacts from WCG as well as participating sponsors and CROs.
  - **Over 12,000 responses were collected worldwide**, resulting in over 19,300 sponsor ratings.
- »» The survey consisted of the following sections:
  - Site **characteristics**.
  - Sponsor and CRO **attribute rating** (40 attributes for sponsors, 26 for CROs).
    - Sites were asked to only select sponsors and CROs with whom they had worked in the last 2 years.
  - **Net promoter score** for sponsors/CROs.
  - **Reputation** rating for 65 sponsors and 28 CROs, regardless of direct experience with them.
  - **Importance** of each of the 40 attributes.

## Site Characteristics Collected



### Respondent Demographics

- Role
- Site Type
- Network Affiliation



### Geography

- Country where respondent (site) is located.



### Site Size

- Number of investigators at site.
- Number of dedicated study coordinators at site.
- Number of trials site can run per year (capacity).



### Site Experience

- Number of years engaged in clinical trials.



### Therapeutic Area

- 22 therapeutic area options.
- Respondents directed to select TAs that make up at least 30% of ongoing trials.

# Analysis Framework

## Site Relationship Framework



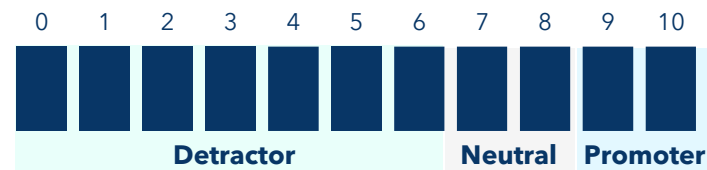
### Attributes

- 40 attributes across 8 categories.
- Sponsors rated only if working with site (up to 3 sponsors selected).



### Net Promoter Score

- Likelihood to recommend sponsor to a colleague.
- Sponsors rated only if working with site (up to 3 sponsors selected).



### Reputation

- Rate overall reputation based on experience and/or perceptions.
- Sponsors rated regardless of working with site.

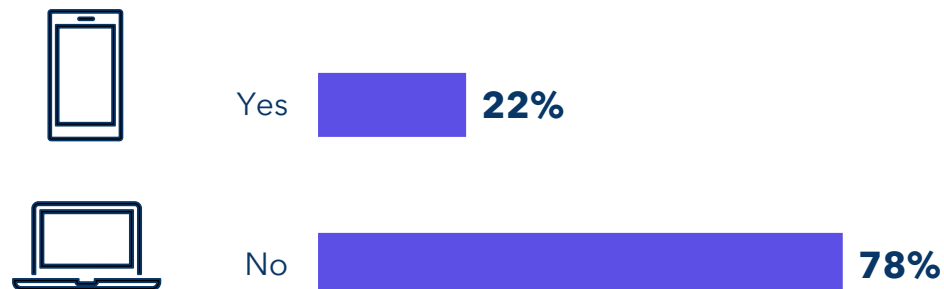


# 2025 Survey Improvements

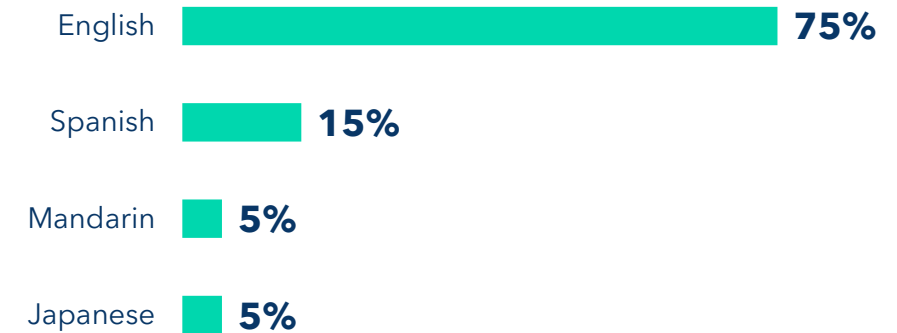
- » **Refined attribute list** in collaboration with 15 major sponsors and CROs.
- » **New** categories for **Diversity** and **Technology Burden**.
- » **Reduction of survey completion time** from 1 hour to 15-20 minutes.
- » **Translation** of the survey into Spanish, Mandarin, and Japanese.
- » **Mobile-device compatible** version to facilitate additional responses.



## Mobile Device



## Languages



# Customer Satisfaction (CSAT) Method

## Industry Performance

- » Reflects industry CSAT performance across multiple characteristics.
- » Includes all companies, regardless of size and sample.
- » Performance is depicted as a **"portrait"**: scores combined in aggregate across all companies.



### Calculation Steps:

Response	Number of Responses
1 (Poor)	30
2 (Fair)	40
3 (Good)	60
<b>4 (Very good)</b>	<b>100</b>
<b>5 (Excellent)</b>	<b>80</b>
Total	310

### Key Benefits:

Easy to interpret, benchmark, and understand position relative to peers.

$$\text{CSAT} = 4 (\text{Very good}) + 5 (\text{Excellent})$$

Total

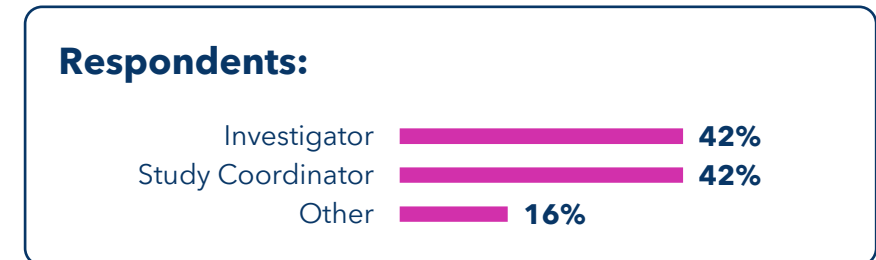
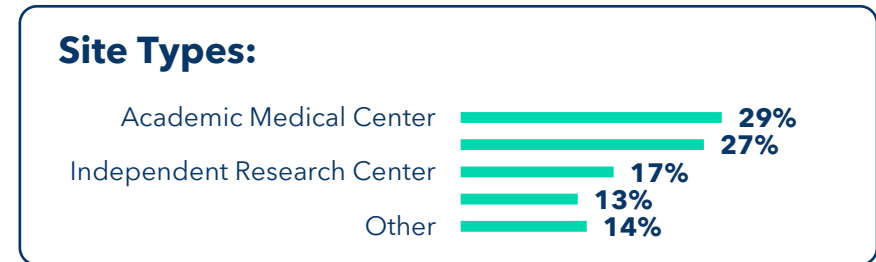
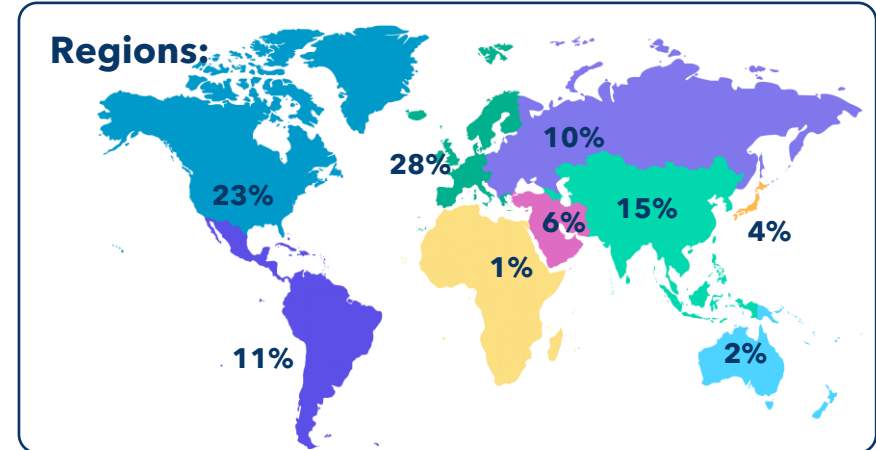
$$\text{CSAT} = 100 + 80$$

310

$$\text{CSAT} = 58\% \text{ satisfied sites}$$

# Survey Response Overview

# Survey Responses



# Industry Results

# Industry Key Findings

## 2025 WCG CenterWatch Global Site Relationship Survey

- »» The level of site satisfaction continued to decline; total CSAT (the proportion of sites rating sponsors Very Good or Excellent) for the 25 attributes present in all surveys is below 70 for the first time, down over 15 points from 2019 and 2 points from 2023.
- »» Study Coordinators show less satisfaction than Investigators across all attributes, regions, site types, and other site characteristics; in the 2025 survey, there is a 10-point gap in satisfaction between investigators and study coordinators.
- »» Technology, a new addition in the 2025 survey that captures site sentiment on the efficiency and manageability of technology platforms used by sites, is the area that showed the lowest ratings; Technology is more than 5 points below the next-lowest attribute category in total CSAT.
- »» Many protocol design specific attributes have decreased in rating: viability of timelines, viability of enrollment goals, protocol-patient friendliness, and incorporation of site feedback in protocol design all decreased from 2023 to 2025 by at least 6%.

# Industry Key Findings

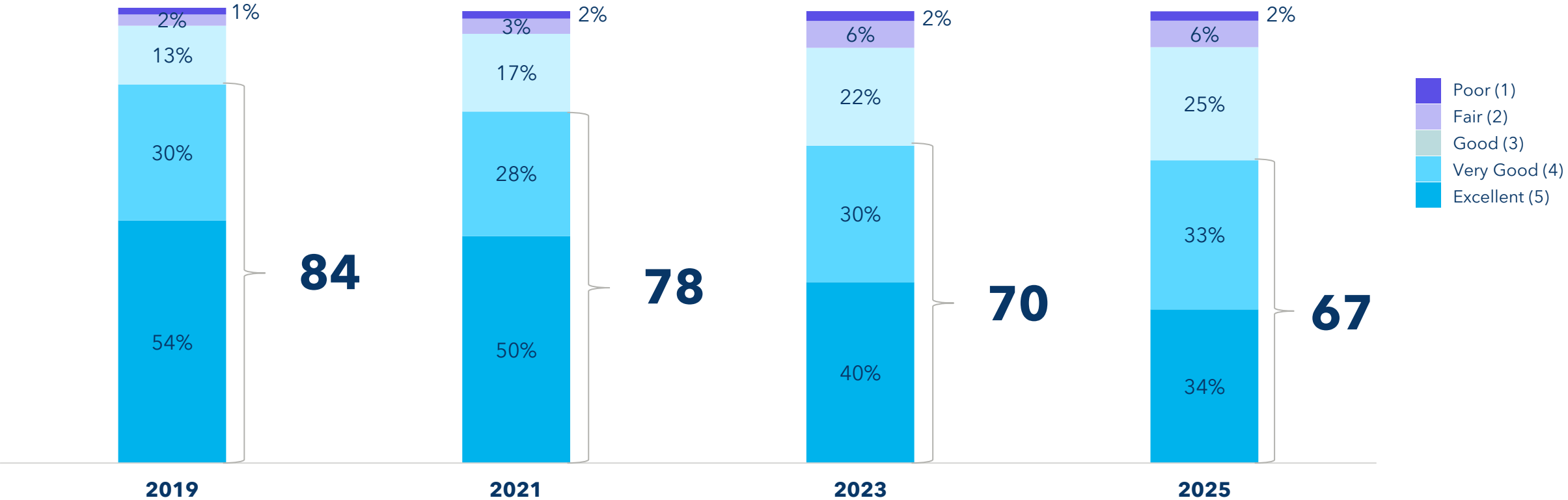
## 2025 WCG CenterWatch Global Site Relationship Survey

- »» Provision of fair payment amounts and overall flexibility in contract and budget negotiations has decreased about 5-6%.
- »» Overall protocol design, quality of communication with study team/site staff, and professionalism, knowledge, and training of monitors/CRAs are the top 3 attributes most important to sites; for all three attributes, 74% of sites rated the attribute “Very Important (5).”
- »» Japan is the region with the lowest satisfaction ratings, with a total CSAT of 36; among study coordinators in Japan the CSAT is only 28, nearly 30 points below the next lowest region.

# Total Attribute Ratings By Year

## All Sponsors & Categories

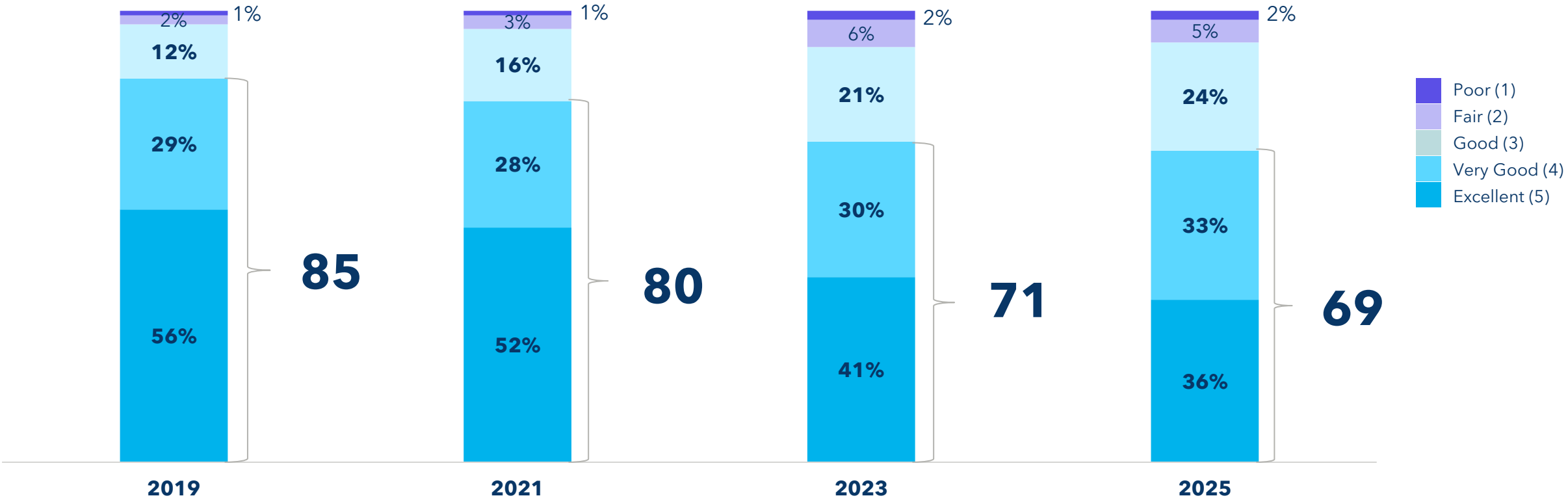
↓ Overall CSAT **continues to decline**; among attributes present in 2023 and 2025, **24 out of 29 decreased** from 2023 to 2025.



# Total Attribute Ratings By Year

## Industry Portrait, Overlapping Attributes

↓ Attribute ratings for the **25 attributes** present in all **four surveys** show a **similar decline**.



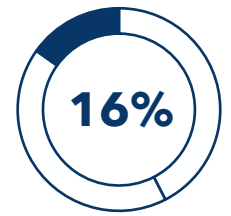
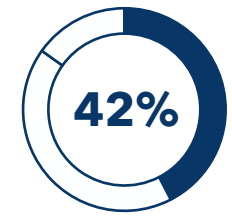
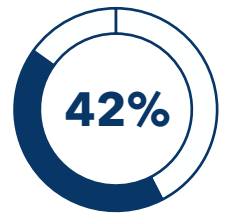
Represents 25 attributes that were present in all four survey years

# 2025 Attribute Ratings By Role

## Industry Portrait, CSAT



%  
SAMPLE

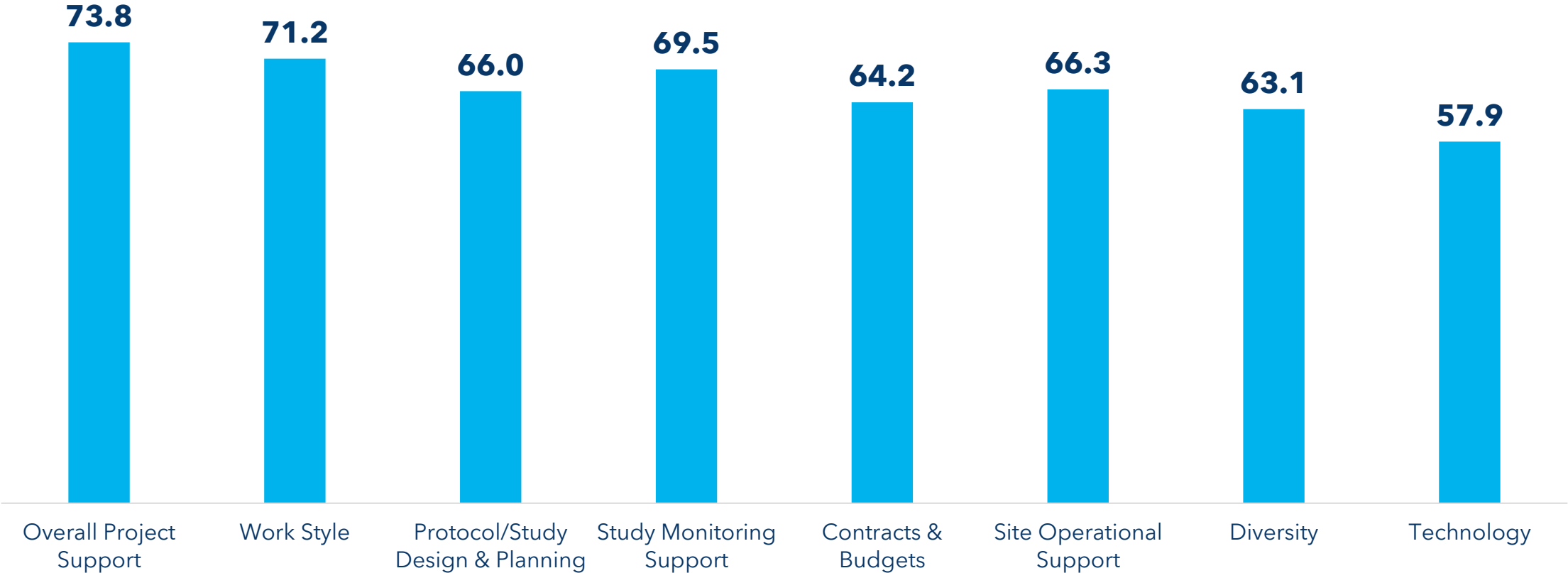


# 2025 Attribute Ratings By Category

## Industry Portrait, CSAT



Technology is the **lowest area** of site satisfaction.

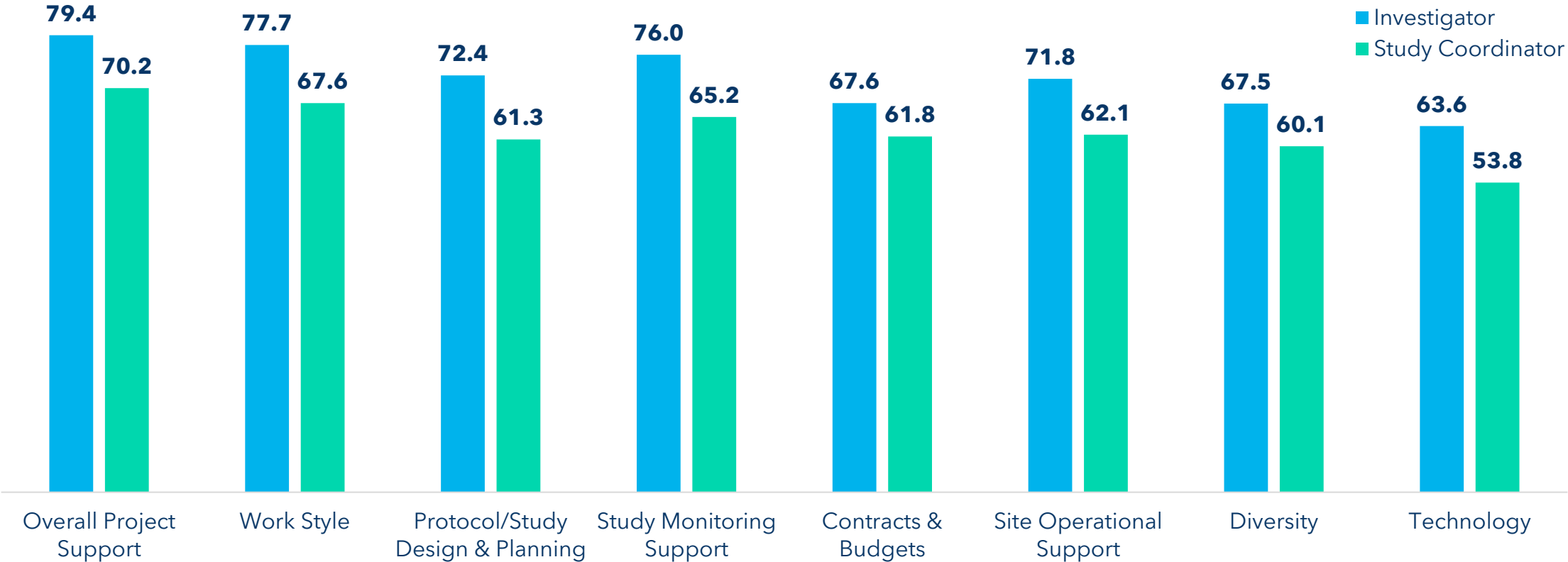


# 2025 Attribute Ratings By Category

## Industry Portrait, CSAT: Investigators vs. Study Coordinators

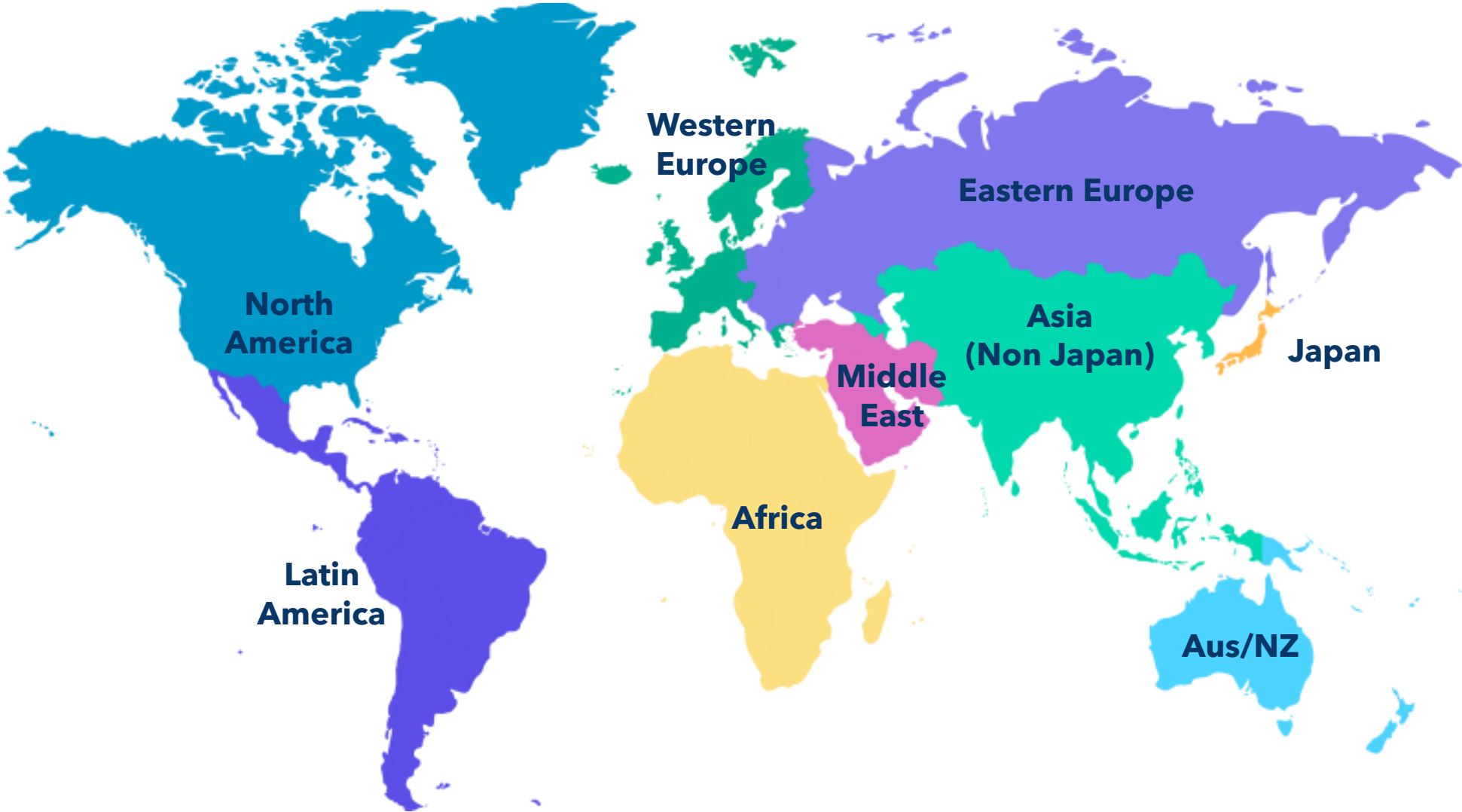


Investigators are **more satisfied** than Study Coordinators in **every attribute category**.



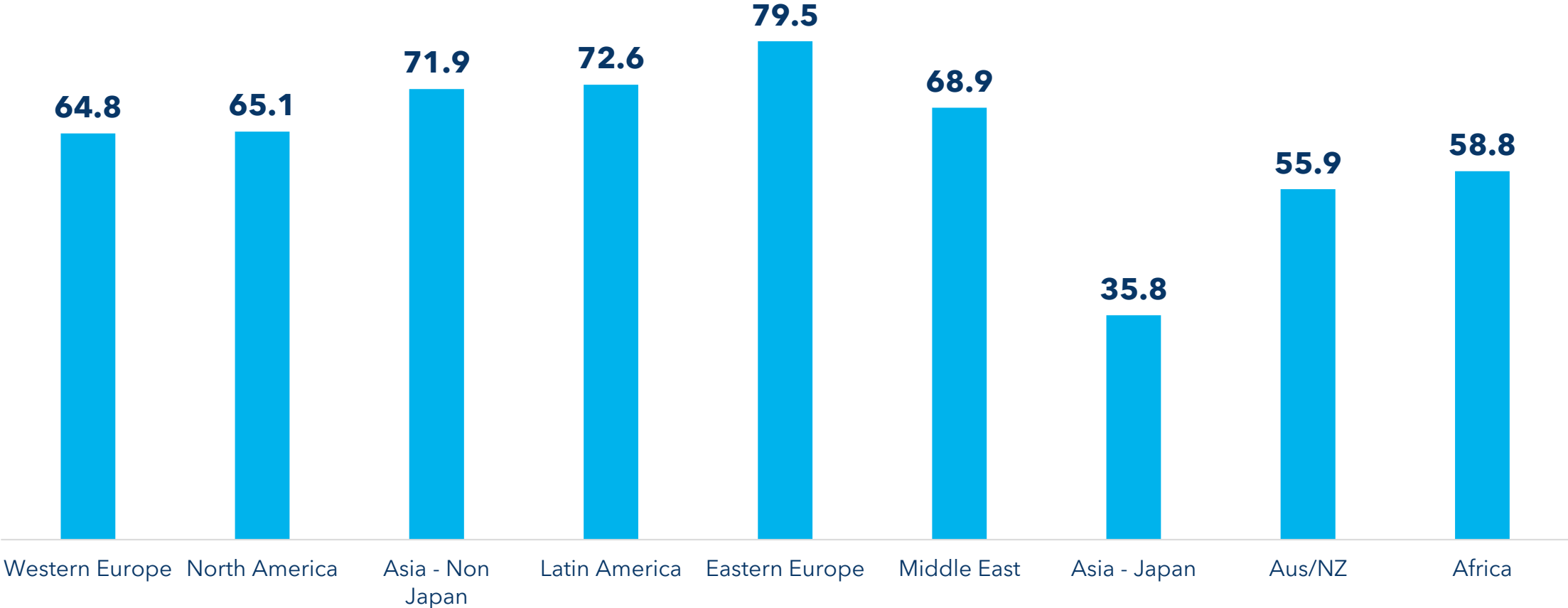
# Industry Results By Region & Country

# Region Mapping



# 2025 Attribute Ratings By Region

## Industry Portrait, CSAT

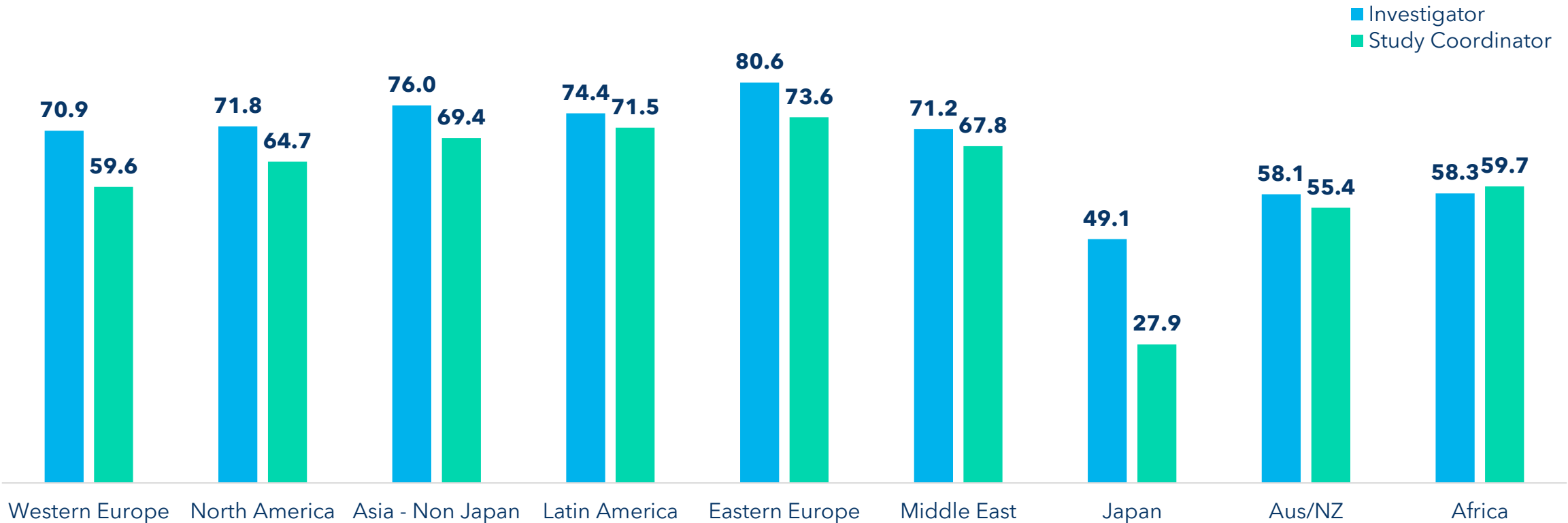


# 2025 Attribute Ratings By Region

## Industry Portrait, CSAT: Investigators vs. Study Coordinators



Investigators are generally **more satisfied** than Study Coordinators across regions.



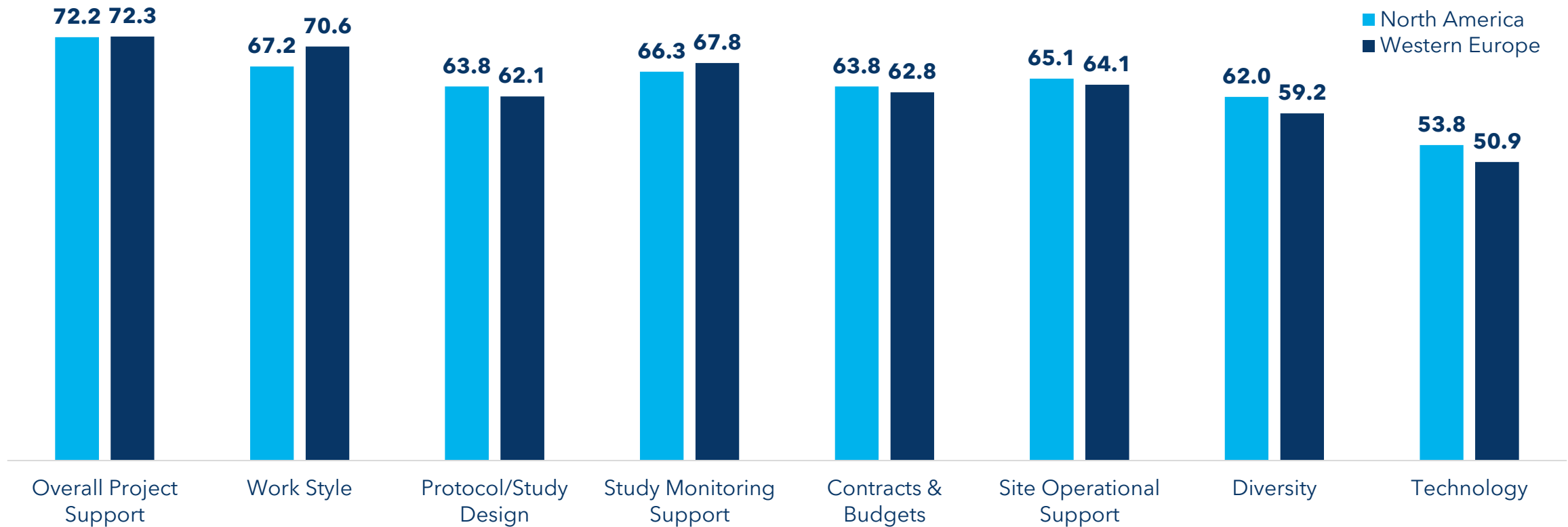
Regions ordered by % of sample

# 2025 Attribute Ratings By Category & Region

## Industry Portrait, CSAT: Western Europe vs. North America



There is some variation by category in the **two largest regions.**

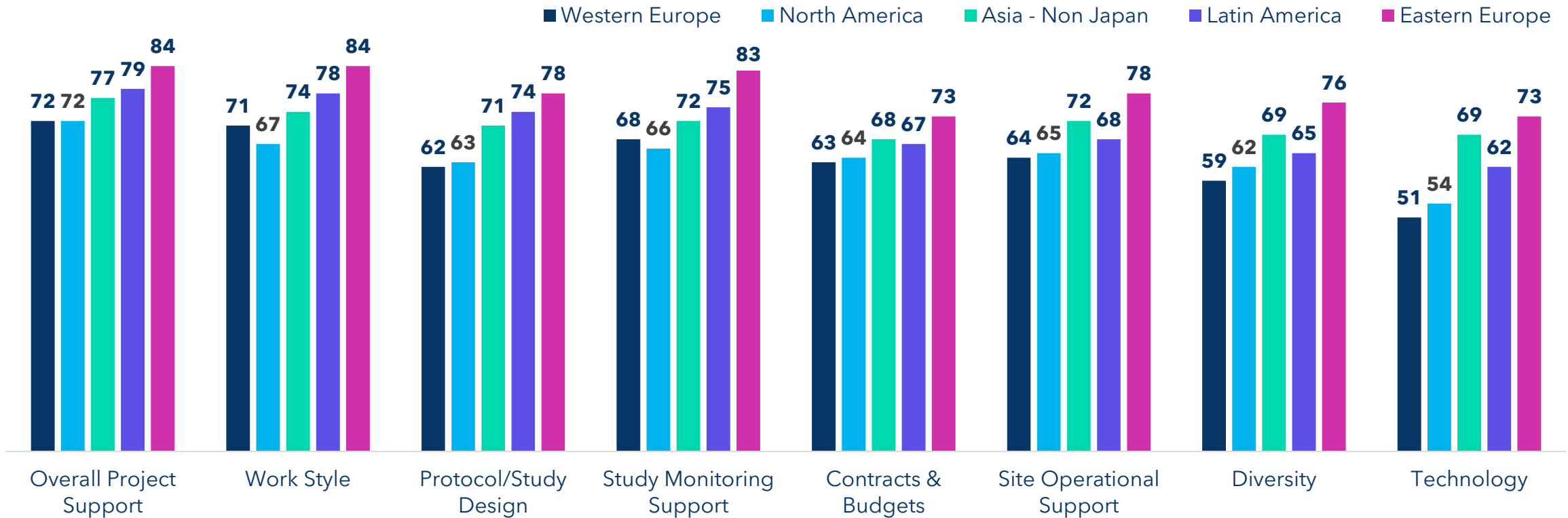


# 2025 Attribute Ratings By Category & Region

## Industry Portrait, CSAT

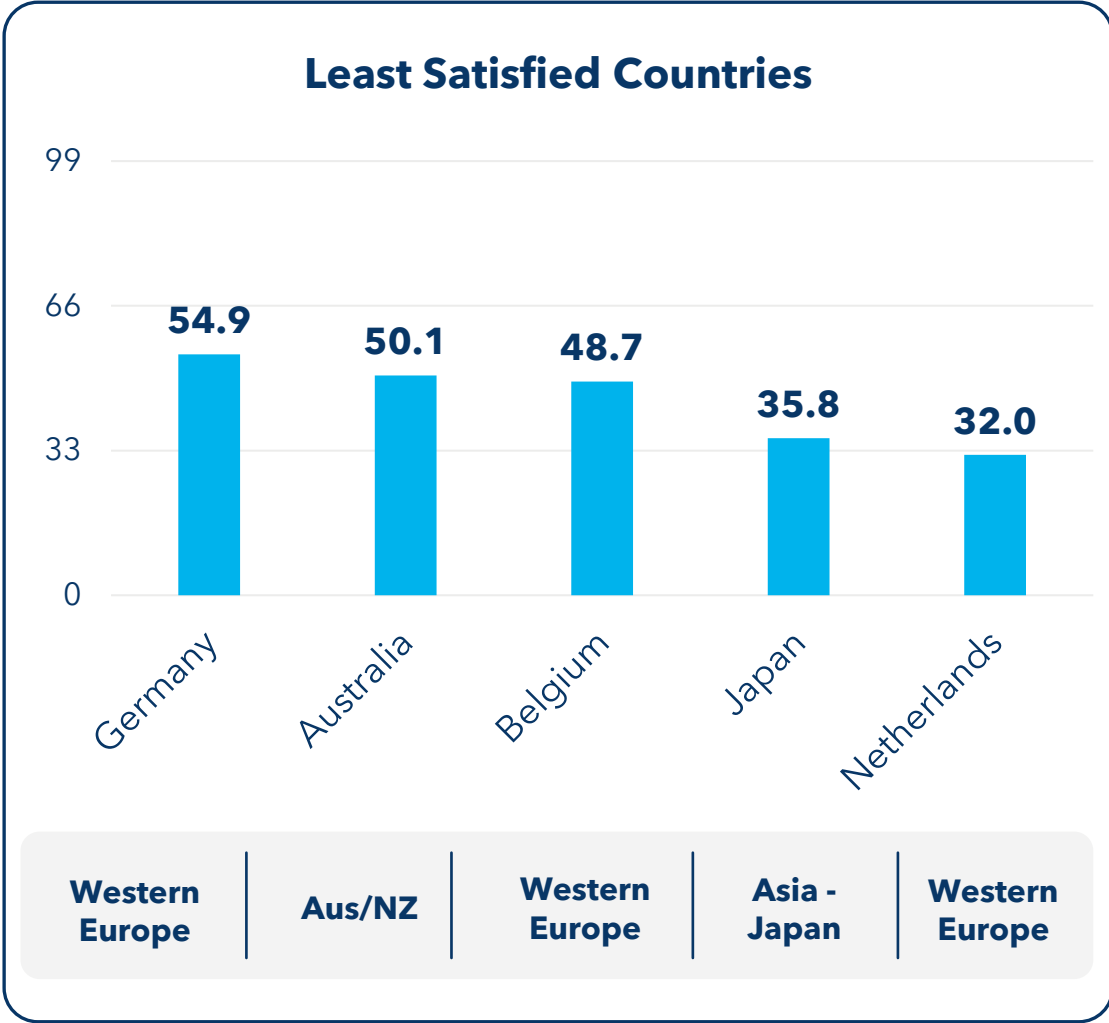


Among major regions, Western Europe is generally the least satisfied region, with North America following directly behind.



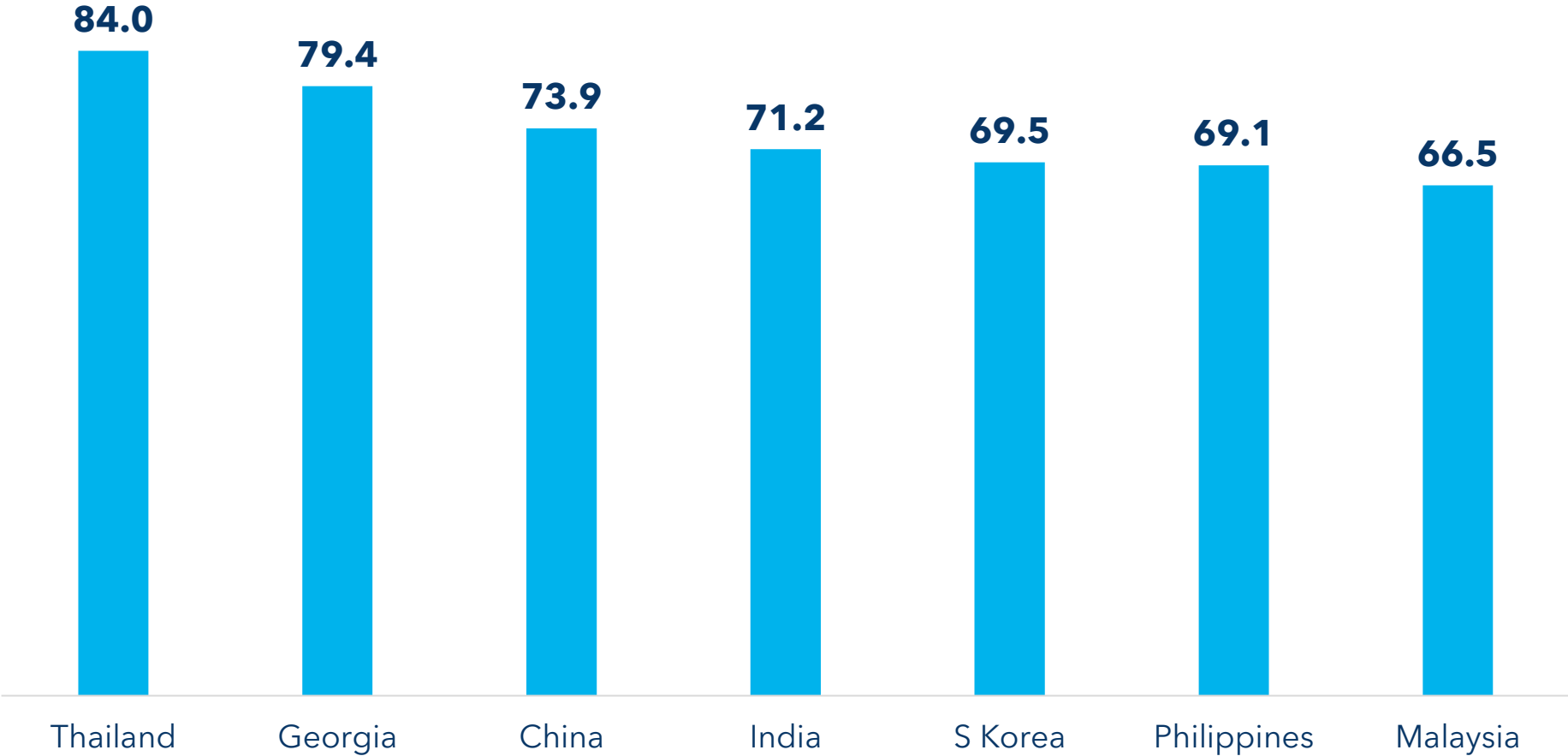
Regions ordered by % of sample; chart represents average CSAT for all attributes within the category

# Industry Most & Least Satisfied Countries



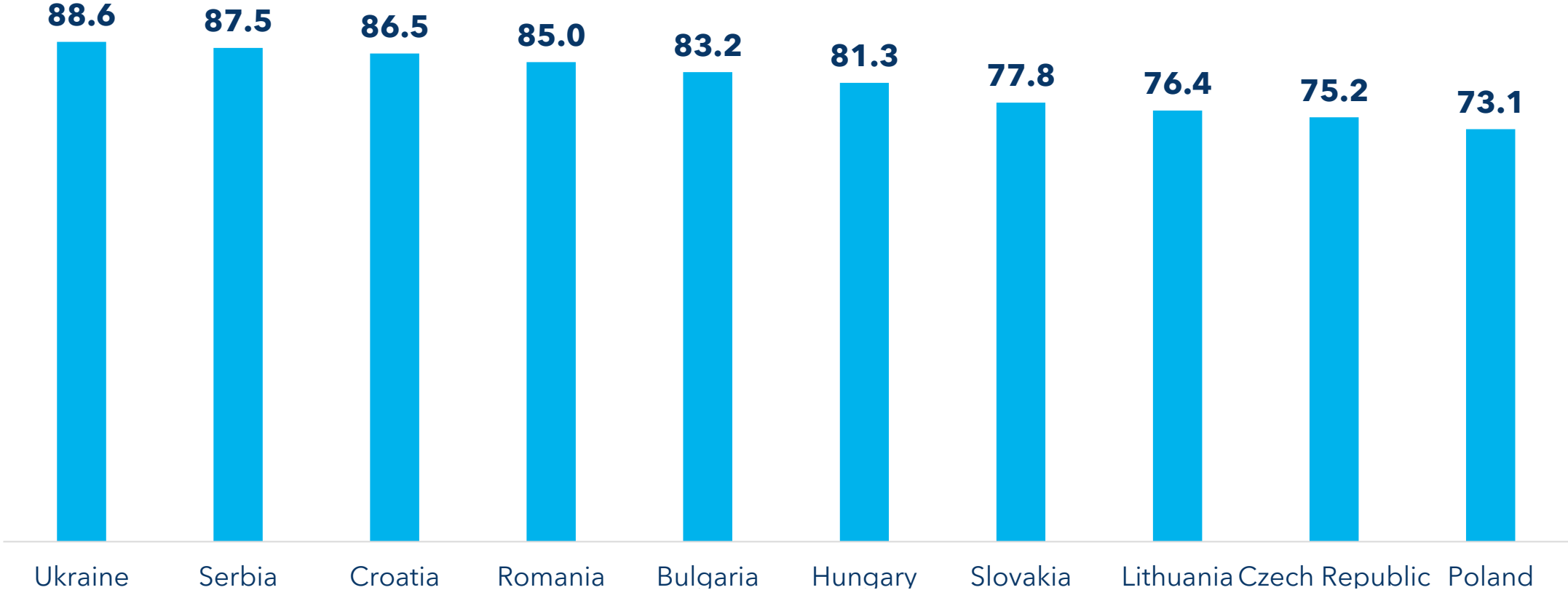
# Industry CSAT by Country

## Asia - Non Japan



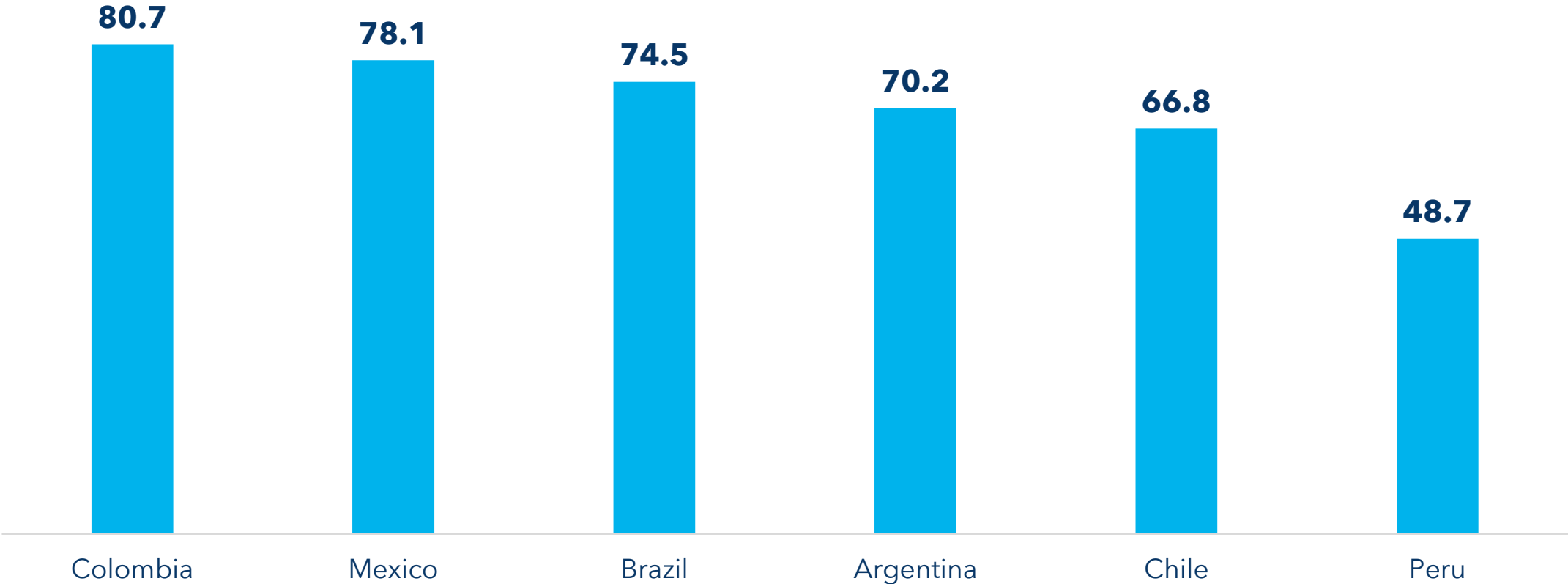
# Industry CSAT by Country

## Eastern Europe



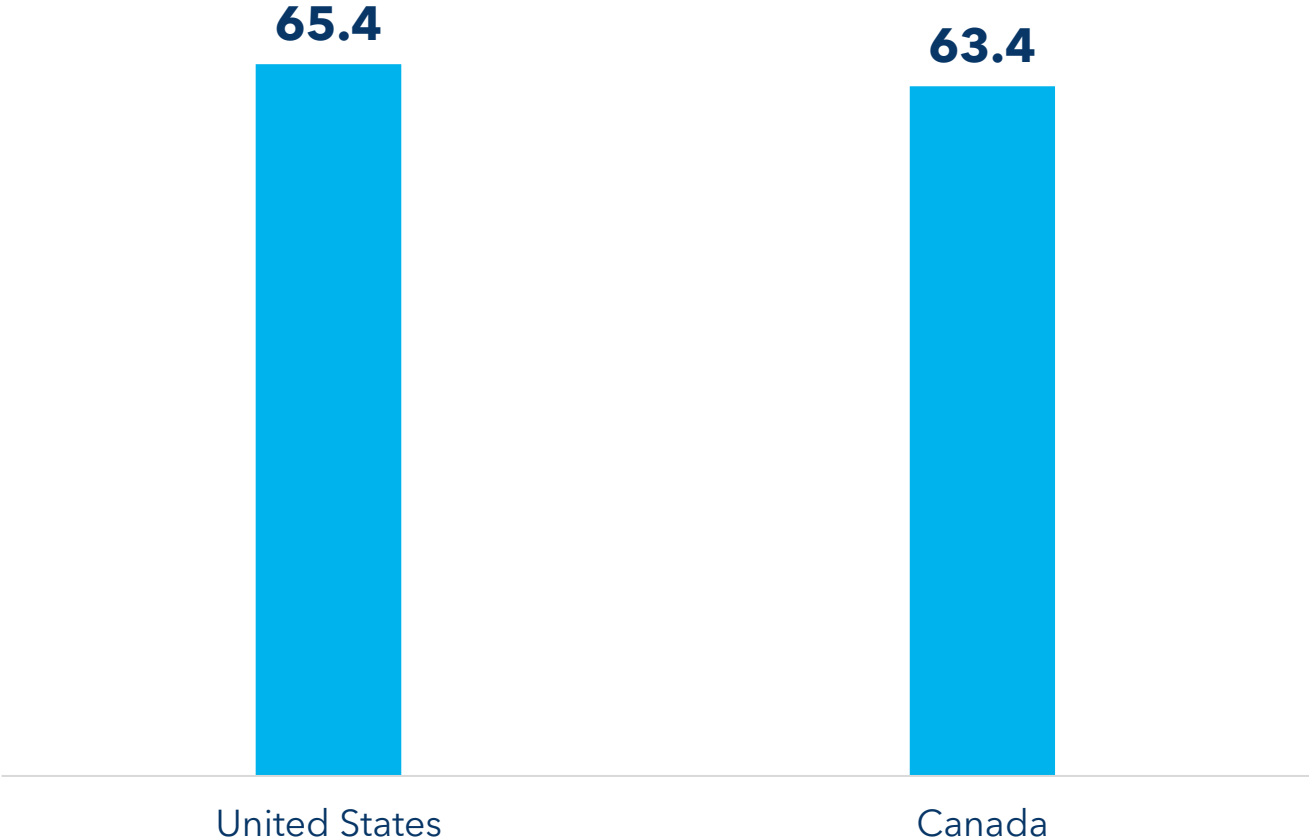
# Industry CSAT by Country

## Latin America



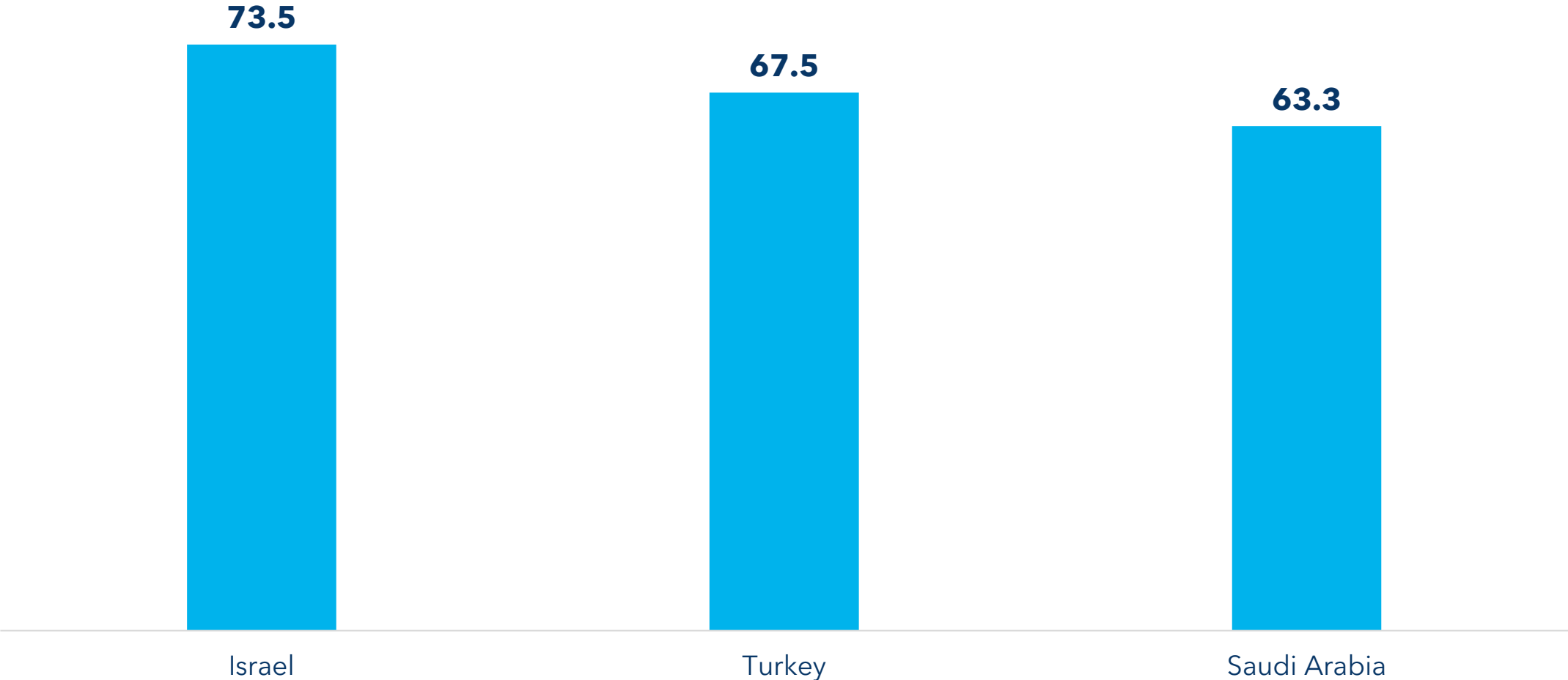
# Industry CSAT by Country

## North America



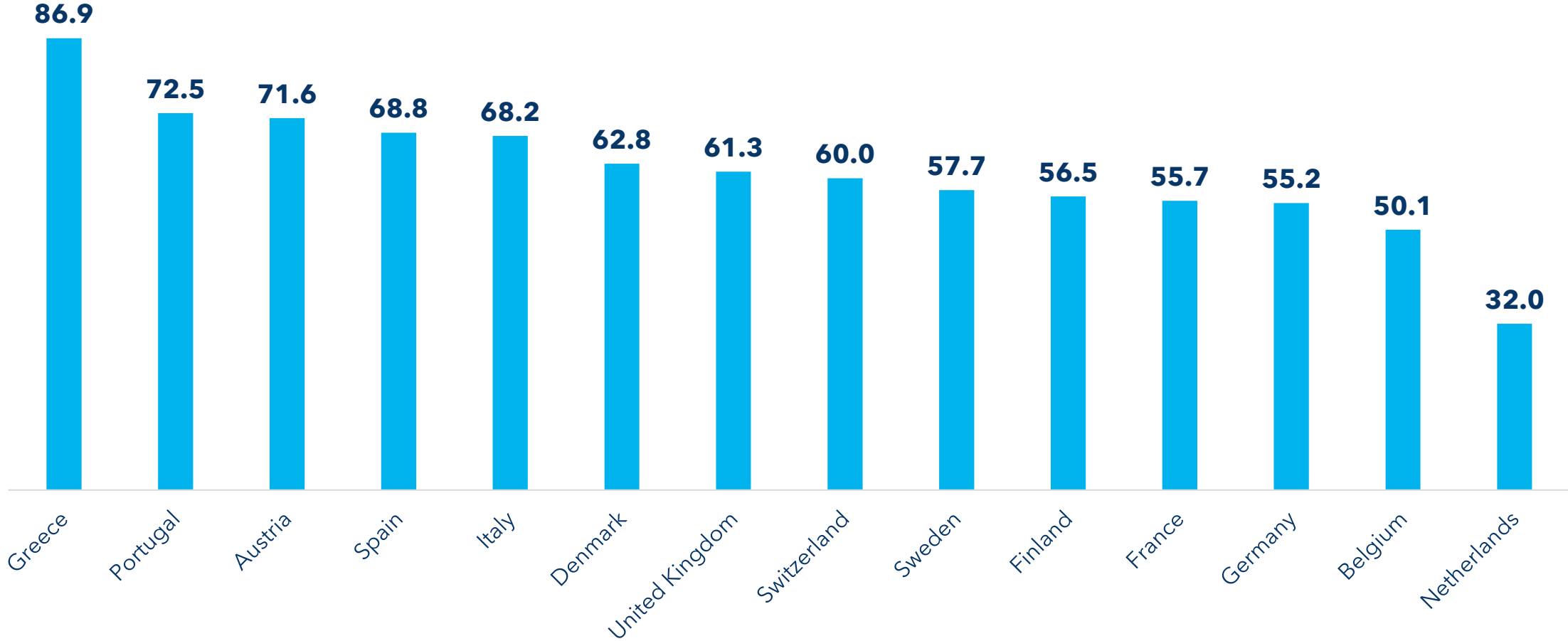
# Industry CSAT by Country

## Middle East



# Industry CSAT by Country

## Western Europe



# Industry Attribute Importance

# Industry Top 10 Most Important Attributes to Sites

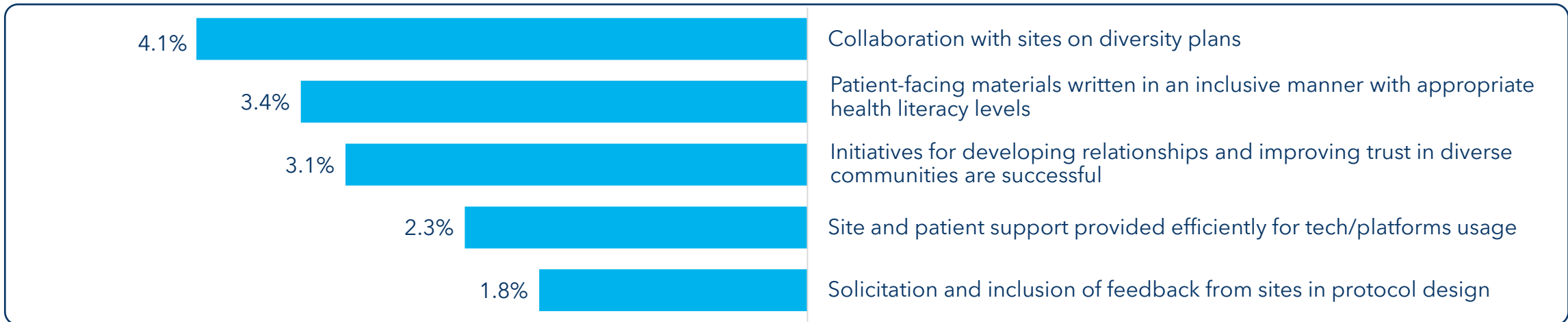
Category	Attribute	% Very Important
1. Protocol/Study Design and Planning	Overall protocol design*	74%
2. Work Style	Quality of communication with study team/site staff*	74%
3. Study Monitoring Support	Professionalism, knowledge, and training of monitors/CRA*s*	74%
4. Overall Project Support	Professionalism of staff in clinical operations functions*	73%
5. Study Monitoring Support	Responsiveness to site staff inquiries*	72%
6. Overall Project Support	Access to staff for escalation and resolution of issues*	71%
7. Protocol/Study Design and Planning	Protocol patient-friendliness*	70%
8. Study Monitoring Support	Organization and preparedness*	69%
9. Overall Project Support	Timeliness of drug availability	69%
10. Protocol/Study Design and Planning	Alignment of protocol with clinical practice realities	69%

\* Indicates attribute was also top 10 in 2023

Importance was rated from 1-5, % in table reflects the proportion of responses rating the attribute "Very Important (5)"

# Industry Investigators vs. Study Coordinators

## Largest Differences in Percent Rating Attribute "Very Important (5)"

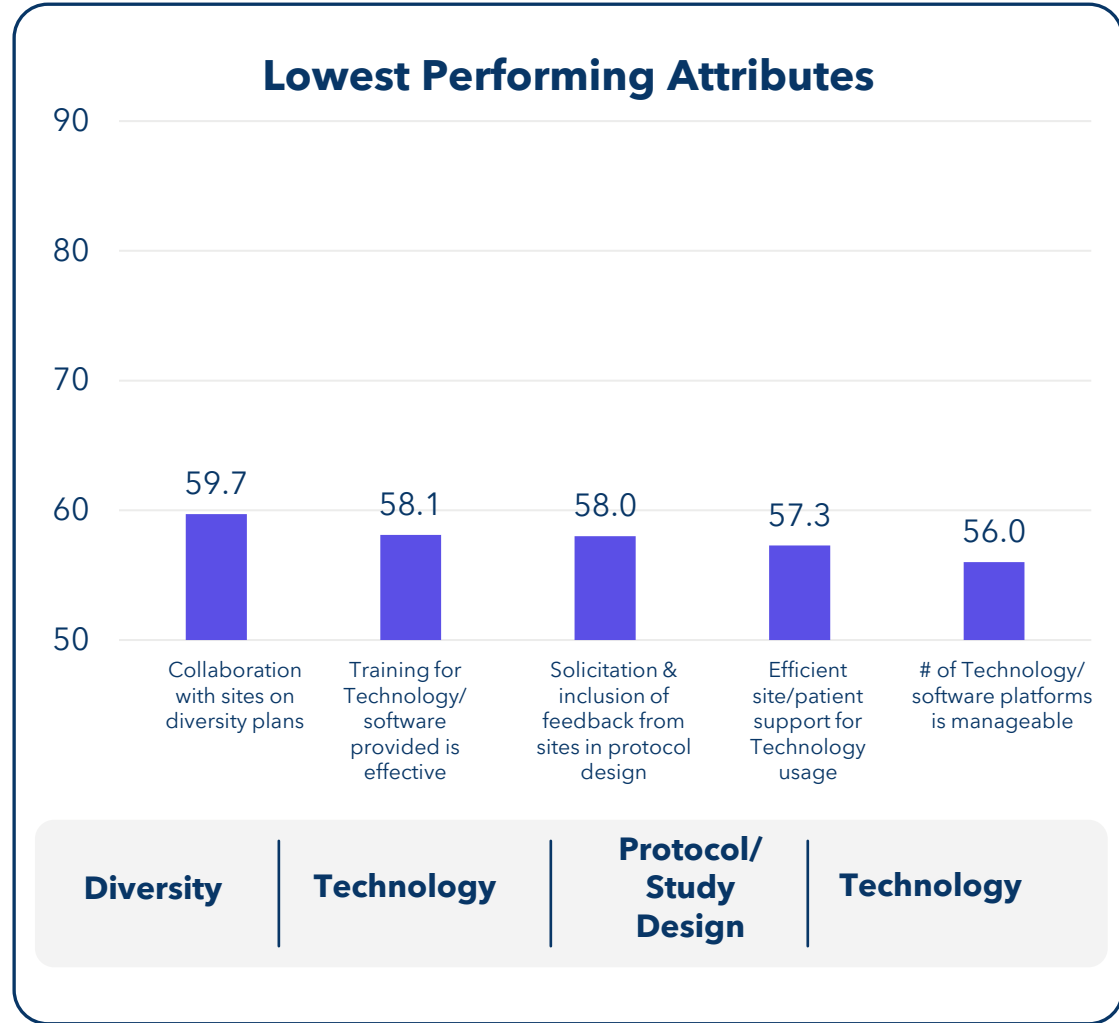
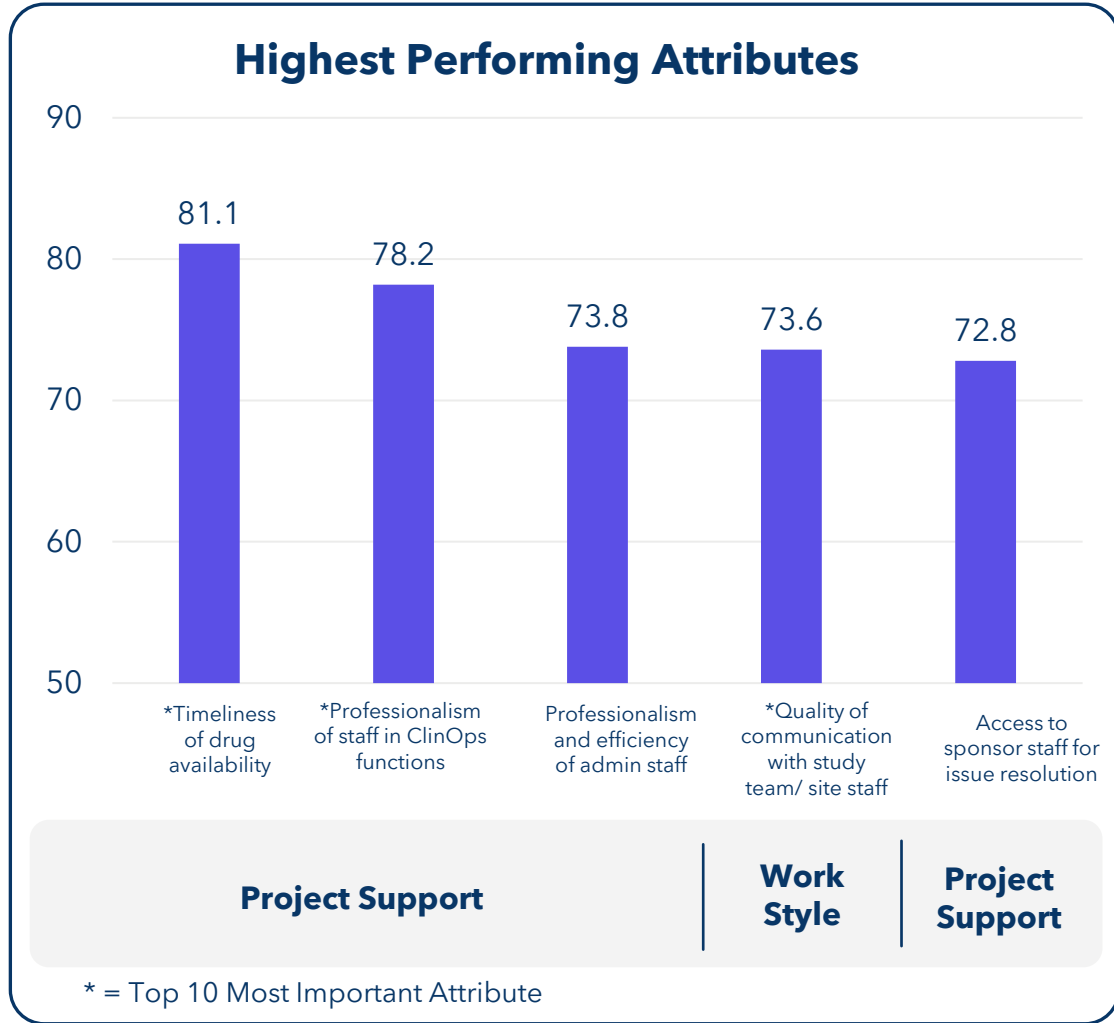


■ More Important To Investigators  
■ More Important To Study Coordinators

The percentages on the chart represent the absolute difference between the % of Investigators rating an attribute Very Important (5) and the same % of Study Coordinators; a green bar indicates the attribute is more important to Investigators, while a blue bar indicates the attribute is more important to Study Coordinators.

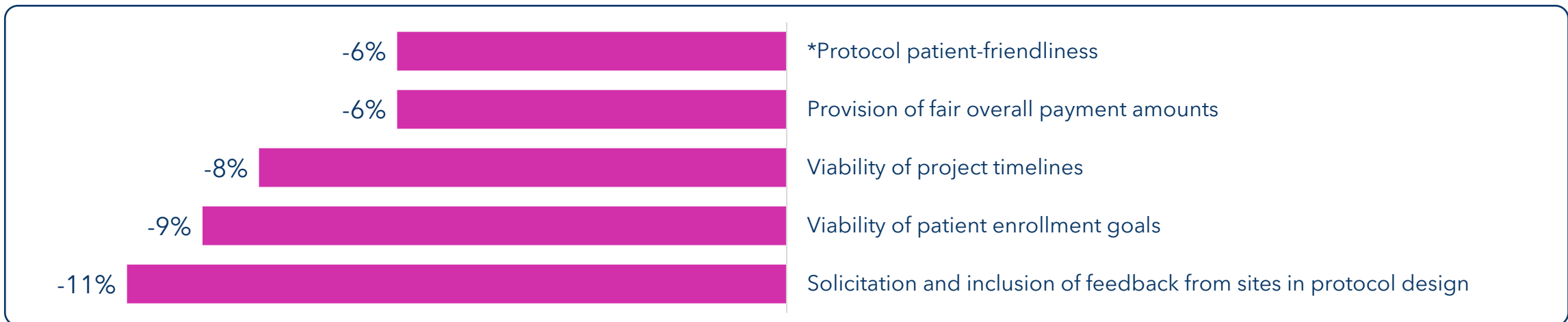
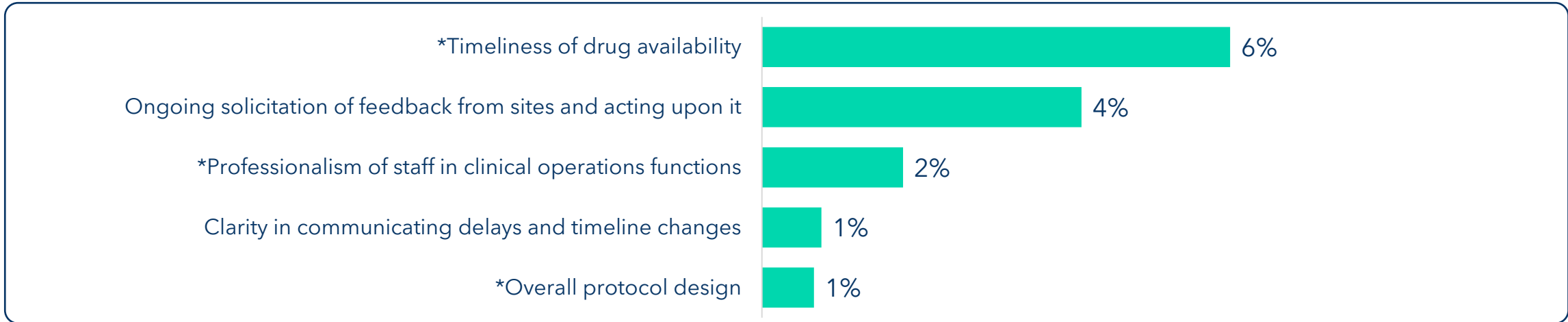
# Industry Attribute Performance

# Industry Top & Bottom Five Attributes



# Industry Largest Changes By Attribute

## Percent Change in CSAT, 2023 to 2025



\* = Top 10 Most Important Attribute

# Industry Changes: 2023 to 2025

## Overall Project Support, Work Style, Protocol/Study Design and Planning

	Attribute	2025 CSAT: Industry	2023 CSAT: Industry	Change from 2023
Project Support	Professionalism of staff in clinical operations functions*	78.2	76.7	+1.5
	Professionalism and efficiency of administrative staff	73.8	73.9	-0.1
	Access to sponsor staff for escalation and resolution of issues*	72.8	74.0	-1.2
	Timeliness of drug availability*	81.1	76.2	+4.9
	Query-handling process	68.9	69.7	-0.8
Work Style	Ongoing solicitation of feedback from sites and acting upon it	68.0	65.2	+2.8
	Quality of communication with study team/site staff*	73.6	73.8	-0.2
	Ability of sponsor to collaborate effectively with CRO	70.8	72.5	-1.7
	Clarity in communicating delays and timeline changes	69.2	68.7	+0.5
Protocol Design	Overall protocol design*	72.2	71.7	+0.5
	Alignment of protocol's scientific rationale with clinical practice realities*	69.7	70.9	-1.2
	Viability of project timelines	65.7	71.7	-6.0
	Viability of patient enrollment goals	65.0	71.7	-6.7
	Protocol patient-friendliness*	63.2	67.4	-4.2
	Solicitation and inclusion of feedback from sites in protocol design	58.0	64.8	-6.8
	Clarity of protocols developed	67.4	70.1	-2.7

\*Attribute is one of the 2025 Top 10 Most Important Attributes  
Table lists only attributes present in 2023 and 2025

# Industry Changes: 2023 to 2025

## Study Monitoring Support, Contracts and Budgets, Site Operational Support

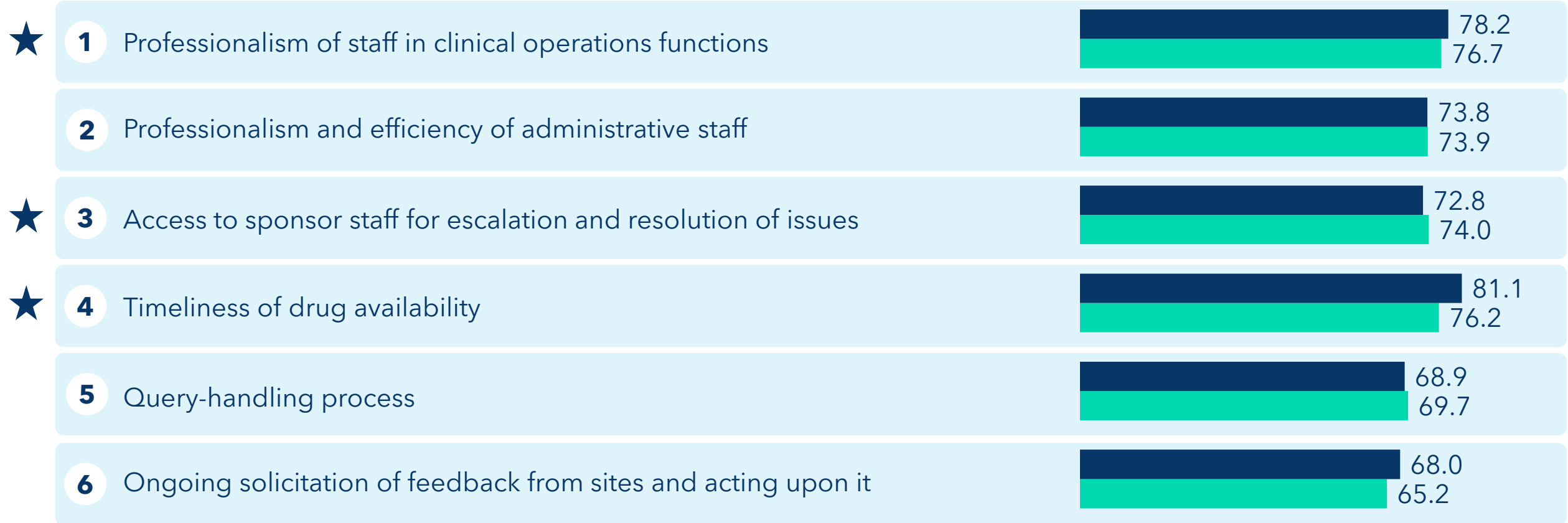
	Attribute	2025 CSAT: Industry	2023 CSAT: Industry	Change from 2023
Study Monitoring Support	Organization and preparedness*	72.2	75.2	-3.0
	Responsiveness to site staff inquiries*	71.2	74.4	-3.2
	Professionalism, knowledge, and training of monitors/CRAs*	71.1	73.3	-2.2
	Monitor/CRA retention	64.2	67.5	-3.3
	Ongoing help/support provided in running the study	70.9	71.9	-1.0
	Communication with site about critical to quality factors and protocol rationale	69.8	69.9	-0.1
	Communication with site about Risk-Based Monitoring (RBM) factors and rationale	67.5	70.0	-2.5
Contracts	Support provided for issue resolution/CAPA development and follow-up	68.4	70.2	-1.8
	Efficiency and flexibility in contract and budget negotiation	64.1	68.1	-4.0
	Provision of fair overall payment amounts	63.2	67.4	-4.2
Op Spt	Timely payments in accordance with payment schedules	65.3	68.9	-3.6
	Training provided during trial implementation	69.4	71.2	-1.8
	Quality of information offered during investigator meetings	71.6	73.7	-2.1

\*Attribute is one of the 2025 Top 10 Most Important Attributes  
Table lists only attributes present in 2023 and 2025

# Industry Attribute Summary

## Overall Project Support

### Full Industry: Portrait CSAT



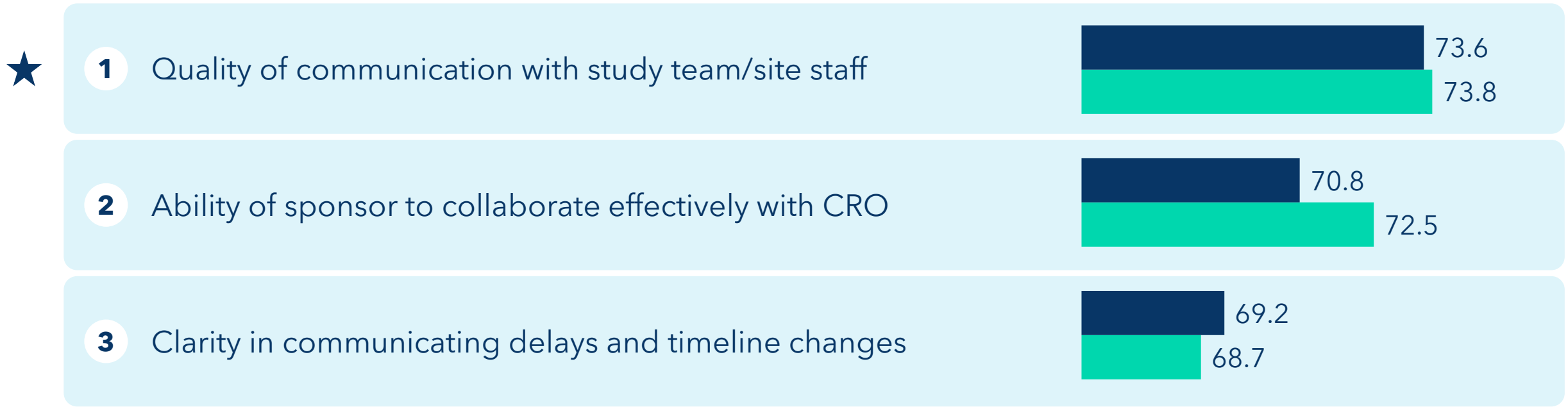
★ = Top 10 Most Important attribute in 2025



# Industry Attribute Summary

## Work Style

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025



# Industry Attribute Summary

## Protocol/Study Design & Planning

### Full Industry: Portrait CSAT



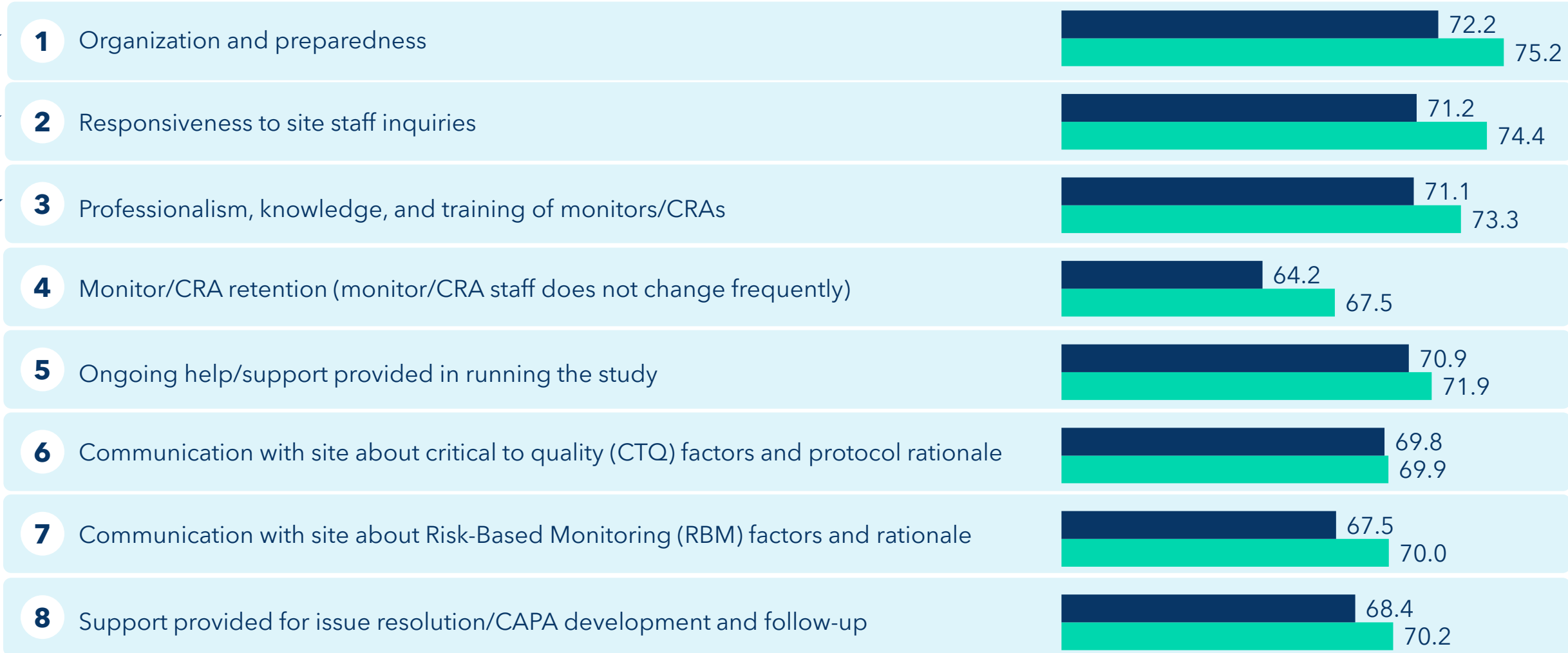
★ = Top 10 Most Important attribute in 2025

2025  
2023

# Industry Attribute Summary

## Study Monitoring Support

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025



# Industry Attribute Summary

## Contracts & Budgets

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025



# Industry Attribute Summary

## Site Operational Support

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025

Site Operational Support attributes #3 and #4 are new in 2025

2025  
2023

# Industry Attribute Summary

## Diversity

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025  
All Diversity attributes are new in 2025

2025  
2023

# Industry Attribute Summary

## Technology

### Full Industry: Portrait CSAT



★ = Top 10 Most Important attribute in 2025  
All Technology attributes are new in 2025

2025  
2023

# Sponsor/CRO Performance

# WCG 2025 Pinnacle Award Winners



## Sponsors

Top Performers	Honorable Mention High Performers
	
	
	
	
	

## CROs

Professionalism & Communication Excellence


Technology Excellence


# Thank you!

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