

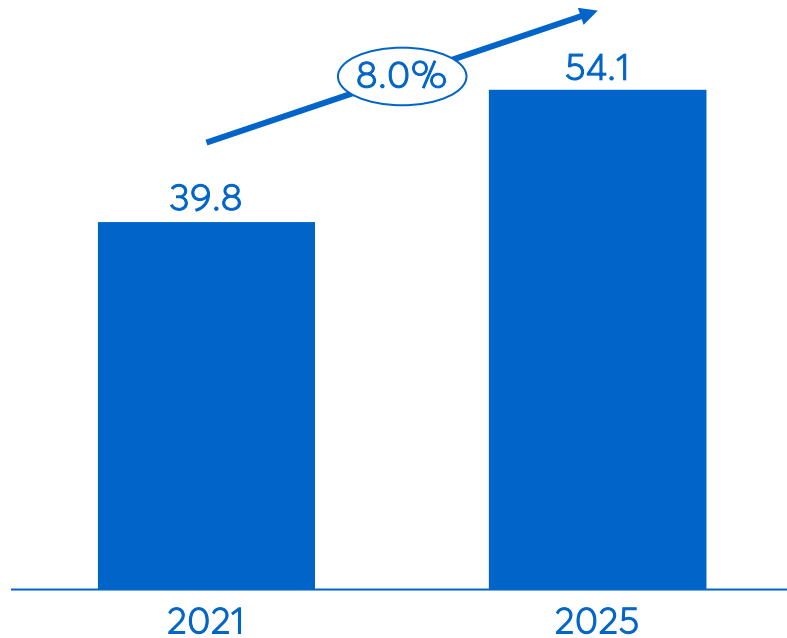
How will the supply chain need to adapt to support the growth of decentralized clinical trials?

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Clinical Services

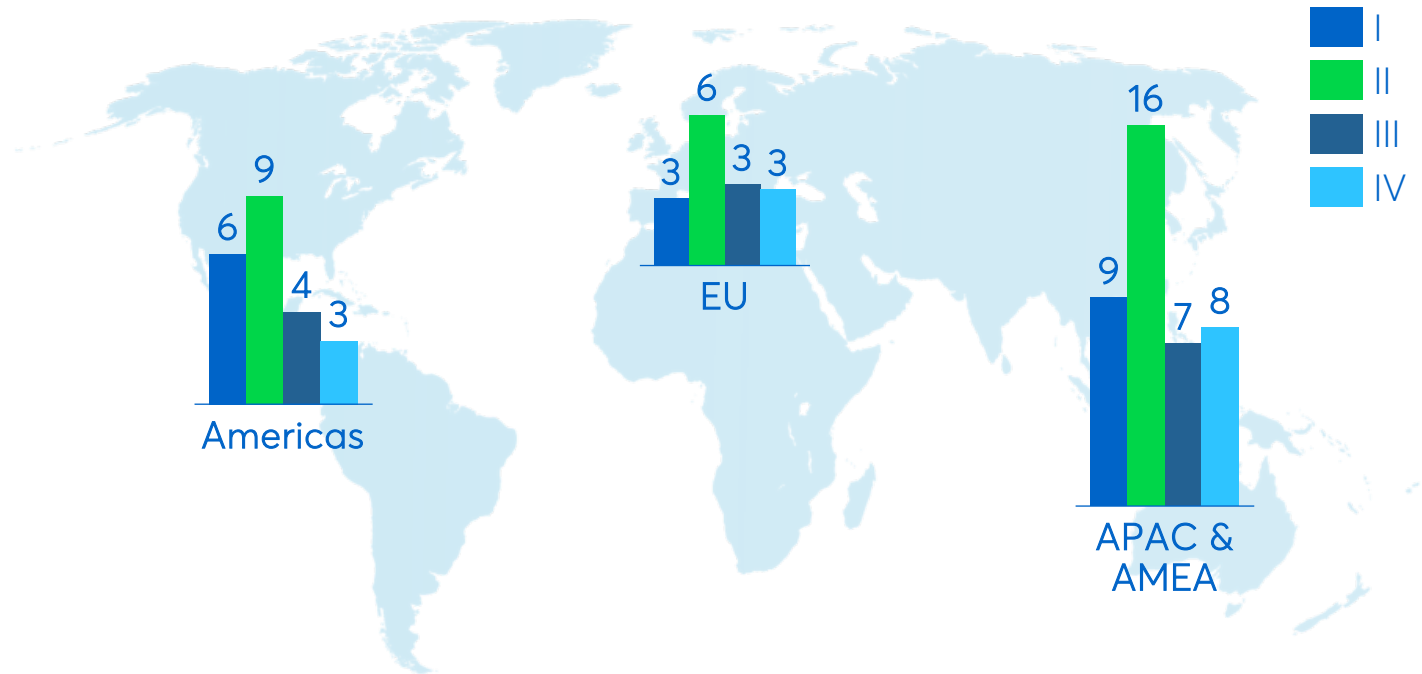


# Continued growth of clinical trial landscape with increasing global reach

Clinical Trials Market  
Estimate \$B



Global & multisite trial with strong regional growth  
#'000 Active Clinical Trials

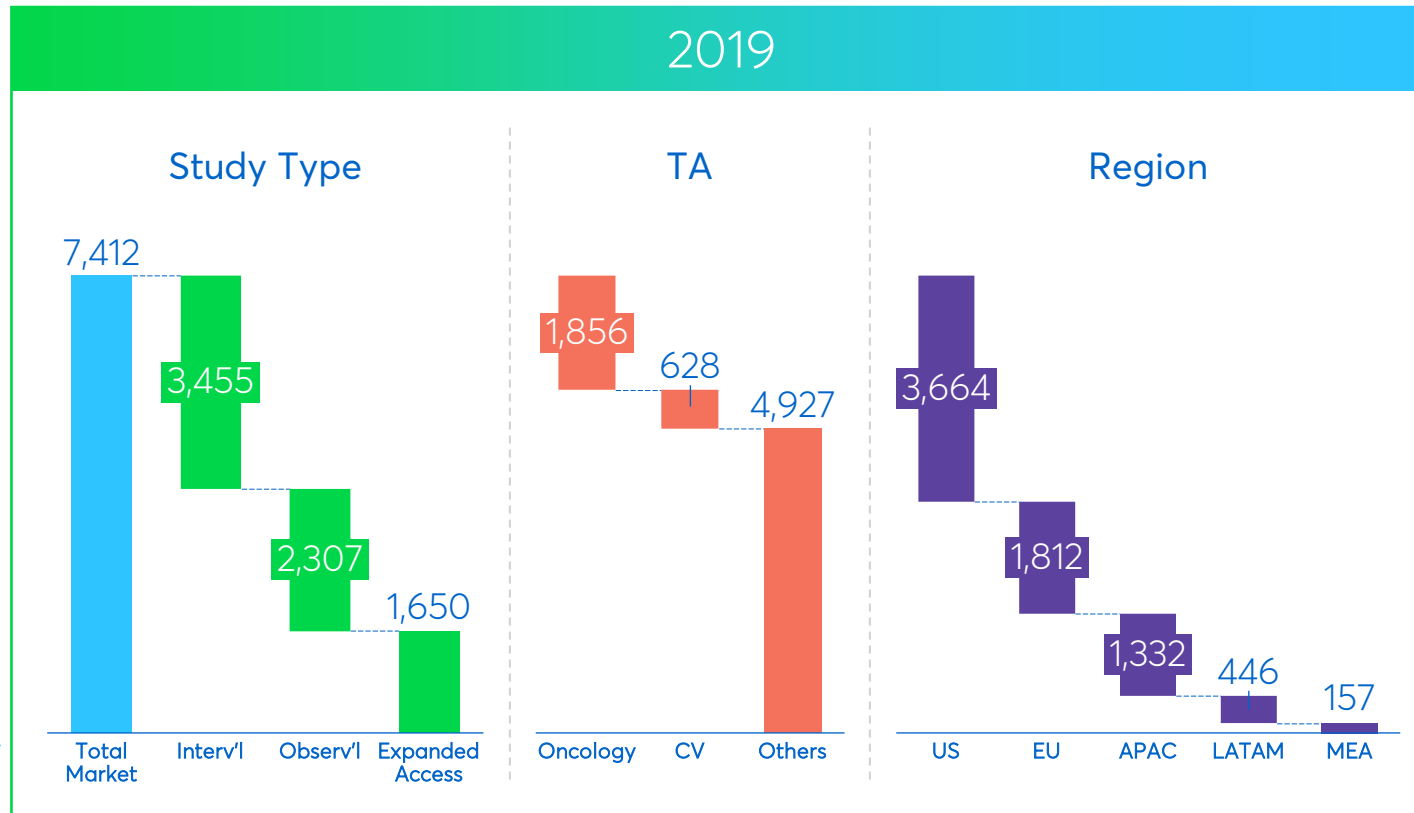
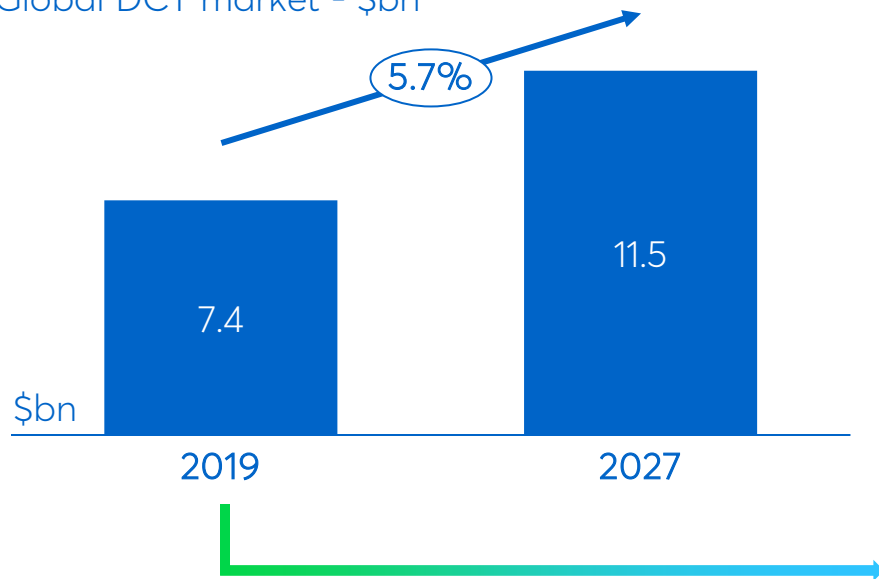


High-complexity, large-scope, global trials will continue to grow, with an estimated 20% of trials running in a decentralized structure – hybrid trials dominating active trials vs. fully virtual leading in post-market surveillance state IV.

Sources: Grand View Research 2021 / GlobalData

# As DCT adoption increases, global DCT market set to continue growth

Global DCT market - \$bn\*

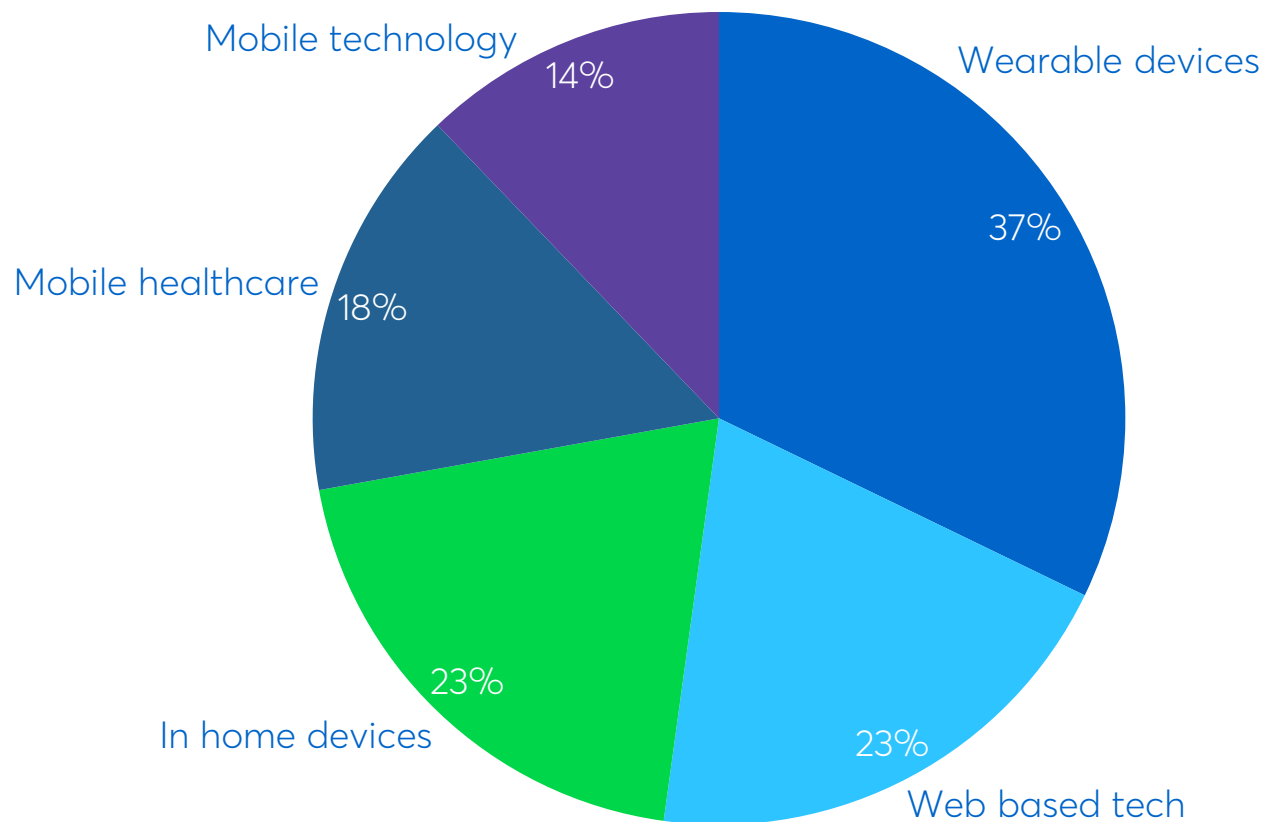


Adoption increases across different study types, with the US leading the way

\*Source: Grand View Research - Virtual Clinical Trials Market (2016-2028)

# Trials are considered DCT when they include specific products and services combined

## COMPONENTS USED IN x% DCTs\*

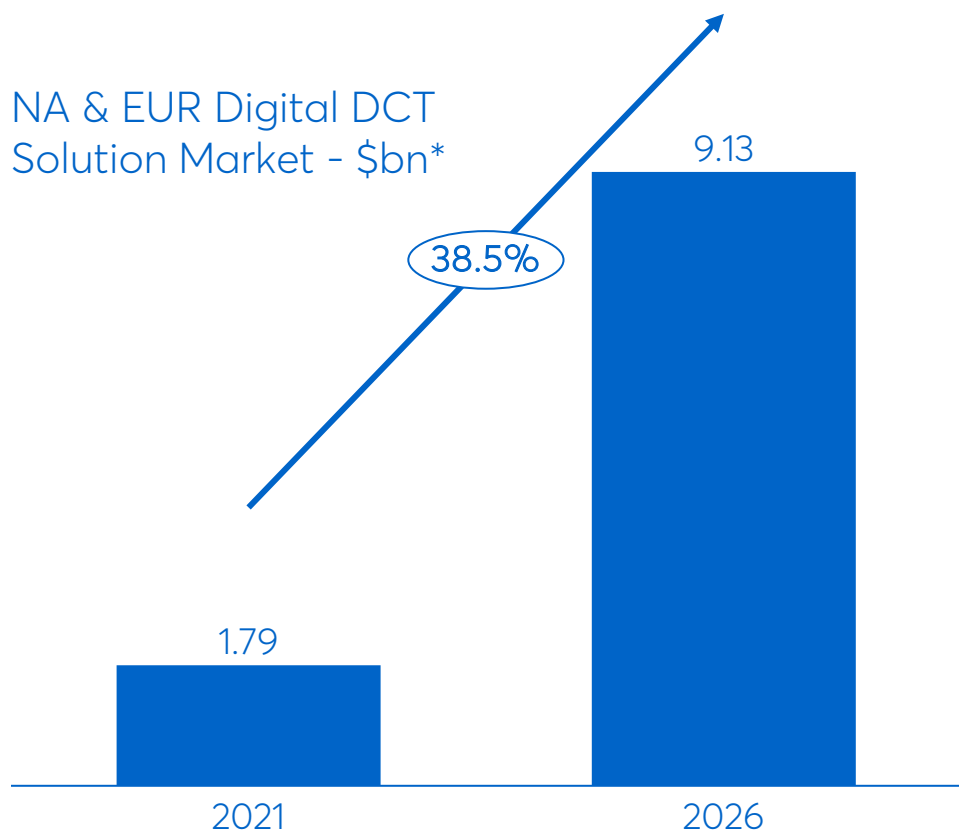


Wearable devices	Web based tech	In home devices	Mobile healthcare	Mobile tech
Activity tracker	Electronic data collection	Blood glucose monitor	Remote patient monitoring	Email
CGM	eCOA	Blood pressure monitor	Remote drug delivery	Text message
Heart monitor	eConsent	Electronic peak flow meter	Telemedicine	Webchat
	eDiary	Oximeter	Home nursing	Smart-phones
	ePRO			Tablets
	Questionnaire			

Health professional engagement away from traditional site is key component of a DCT – hybrid or virtual

\*Source: Global Data, April 2022

# Market for digital DCT solutions has boomed since start of pandemic, remaining dynamic, with rapid growth forecast



500+ vendors entering the supply chain with digital DCT solution in Europe and North America\*

Investments in market grew by 114% in 2020 to reach \$750 million\*

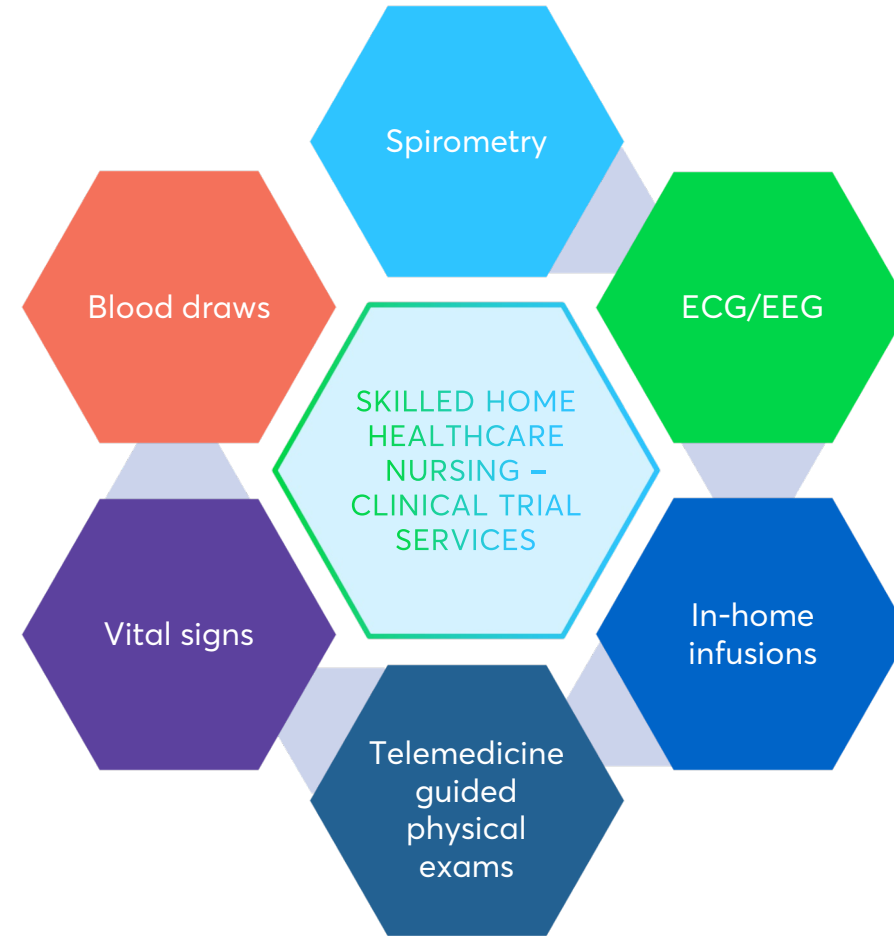
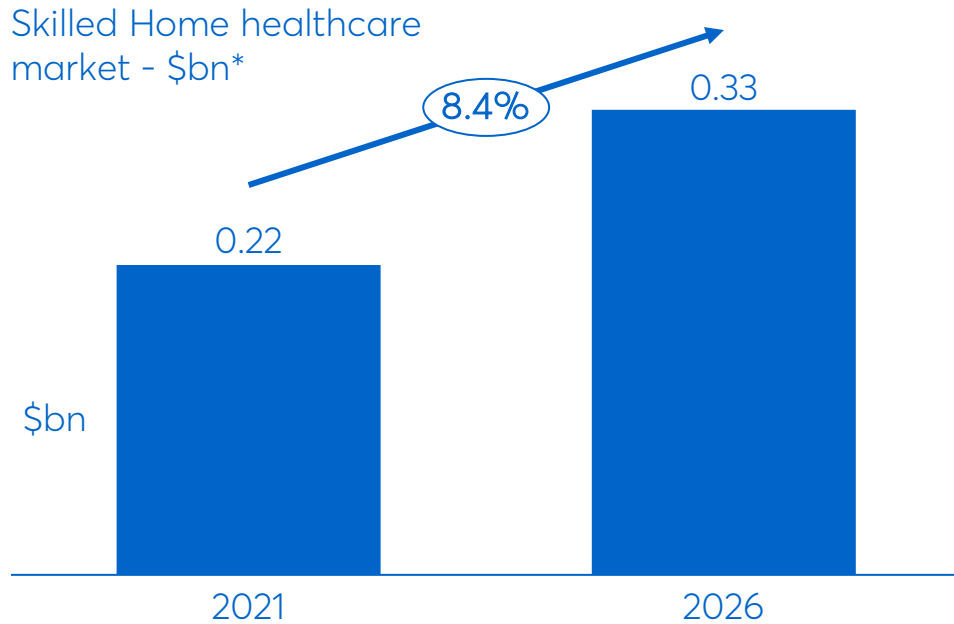
2021, \$710 million was raised in only first 8 months\*

Players in market interact through both cooperation in partnerships, and competition for clients\*

Simultaneously, market is quickly consolidating as key competitors acquire others\*

\*Source:  
Research 2 Guidance: The Digital Decentralised Clinical Trial Solutions Market- 2018-2026

# Growth of HHCN services market facilitates move away from central site, whilst enabling benefits of increased patient centricity



Patient recruitment 60%+ increase...

Patient retention 90%+...

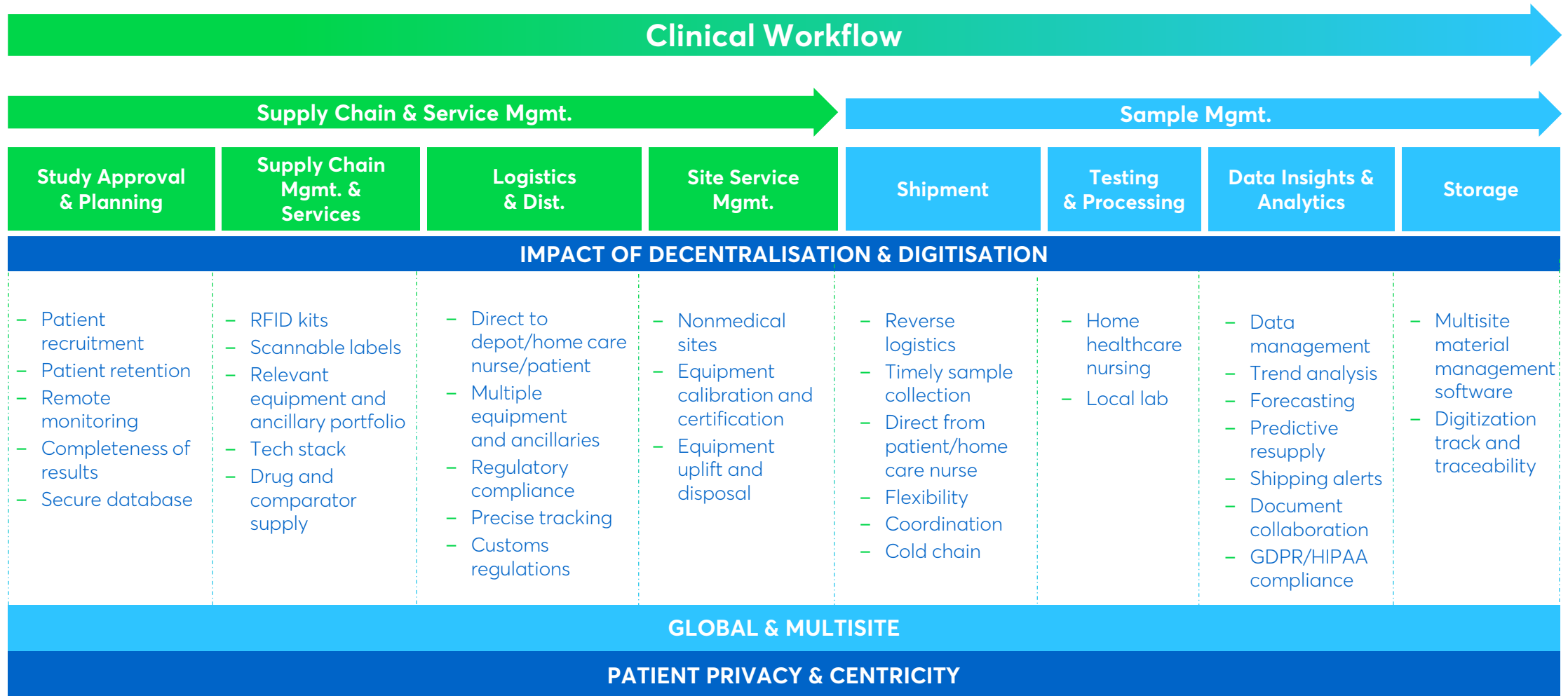
...through decentralising and digitising site activities into patients' homes\*\*

Source:

\*Home Healthcare Market Estimates and Trend Analysis 2016-2027 – GrandView Research

\*\* <https://www.clinicalleader.com/doc/decentralized-trials-trends-technology-propelling-home-healthcare-services-0001>

# Decentralization impacts every step of the clinical workflow



# Digitization and decentralization go hand in hand



## DECENTRALIZATION & DIGITIZATION



### PATIENT CENTRICITY

- Enrollment
- Engagement
- eConsent
- ePRO
- Retention



### PRODUCTS

- Intuitive
- Medical
- Nonmedical
- Preloaded
- Integrated
- "Out of the box"



### DATA

- Fundamental/ validation
- Quality & integrity
- Compliance
- Multisite collection
- IoT
- eCOA
- Privacy



### ANALYTICS

- Reduce risk/ increase speed
- Real-time
- Predictive
- AI
- ML
- Safety monitoring
- Guided interventions

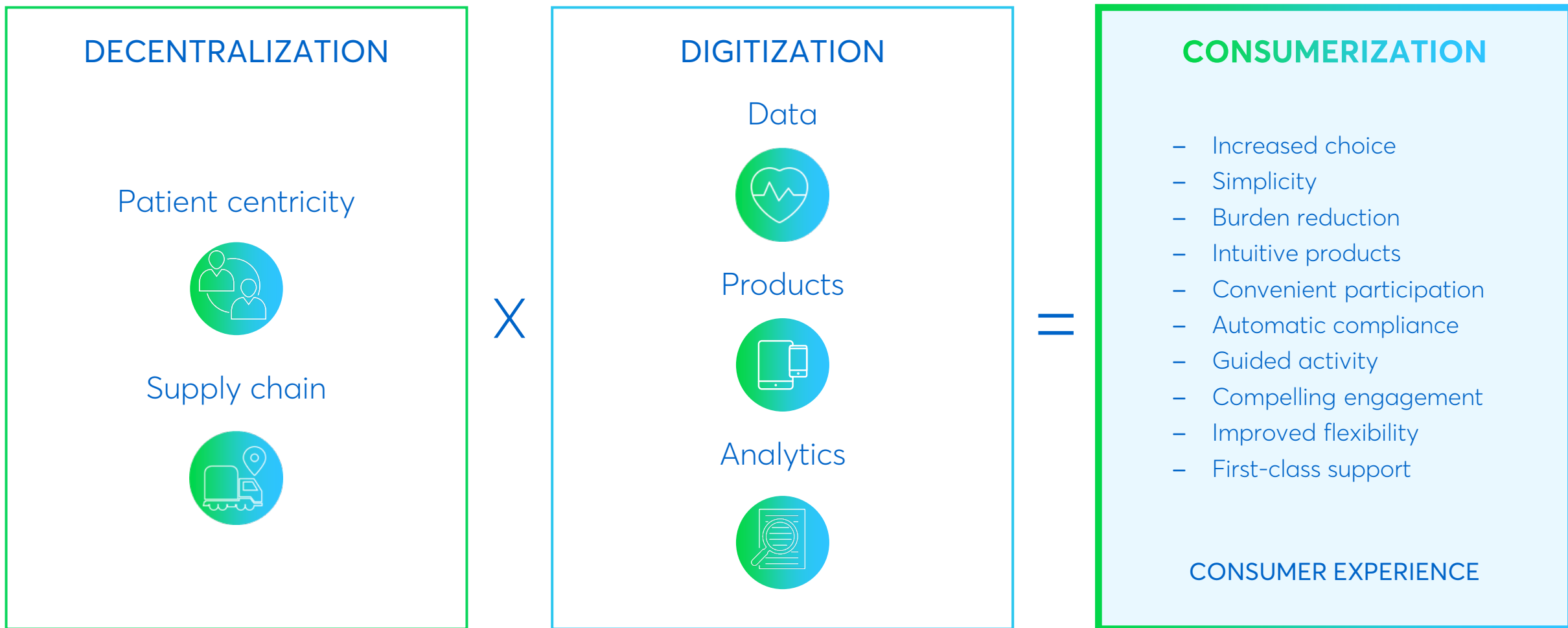


### SUPPLY CHAIN

- Integration
- Visibility
- Real-time
- End-to-end



# Does decentralization x digitization = consumerization?

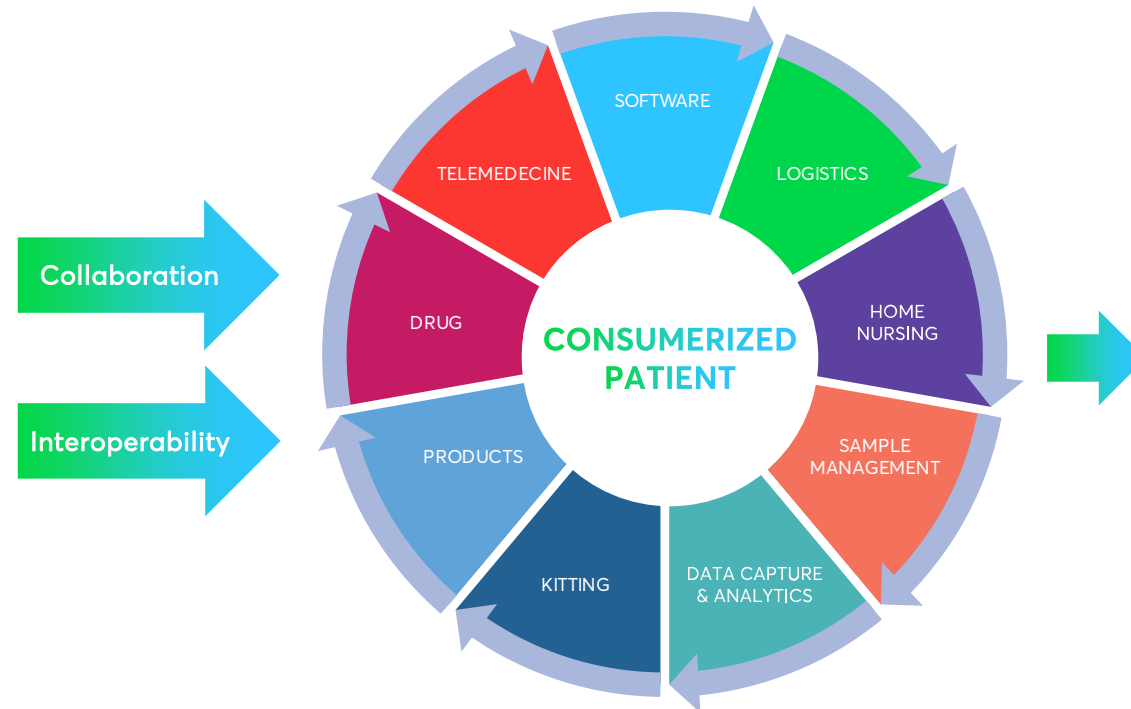


# Is the supply chain challenge of consumerization worth rising to?

## STAND-ALONE EXPERTS



## COLLABORATIVE EXPERTISE



## BENEFITS TO THE SPONSOR

- Improved patient recruitment and retention
- Reduced cost
- Increased efficiencies
- Better patient representation
- Superior success rates
- Stronger evidence package

**DRUG TO MARKET FASTER**  
80% clinical trials finish late due to patient recruitment challenges and drop out\*

\*Source: Global Data June 2021

# Our experiences



Early, emergent signs of DCT adoption within our customers

Adoption curve of virtual DCT solutions not steep – comfort with hybrid model

Site and depot remain key supply chain entities

New vendor partners entering supply chain – particularly home healthcare nursing and digital DCT solutions

Patient data protection needs additional consideration throughout supply chain – especially for direct-to-patient

Willingness to connect systems, but long road to achieve interoperability

Not wholesale usage of digitized technology suite – scales, CGM, BPM still significant alongside “consumer wearables”

# Our experiences



Not everyone set up to take full advantage of decentralized clinical trials

Still some way to go toward fully virtual DCTs

Vendors and CROs/sponsors need to collaborate to reach consumerized patient experience and unlock all DCT benefits

**How can we work together to ensure this collaboration?**

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# Q&A

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