The number of active unique principal investigators (PIs) conducting FDA regulated clinical trials worldwide has reached a record of nearly 40,000, but growth is slowing.

North America continues to lose its share of active global FDA-regulated PIs.

The numbers of active PIs in India and China, countries once expected to see the most dramatic relative growth, have declined by 16% and 5%, respectively.

Investigator turnover has increased dramatically: half of all unique PIs who filed a form 1572 in 2009 have yet to file again, up from 40% four years ago.

The number of annual CDER inspections of sites outside the United States has tripled since 2001, while declining by 36% inside the U.S.

Protocol noncompliance, the area of performance deficiency that has grown the most during the past decade, accounted for 46% of all investigative site deficiencies.

Operating conditions for clinical studies has noticeably worsened in recent years. The global investigative site landscape remains highly fragmented and inefficient with no indication that it will consolidate and begin achieving scale efficiencies soon. Half of all unique global investigators regulated by the U.S. Food and Drug Administration (FDA) filed a 1572 form for the first time in 2013. Wide variations exist in the experience levels of investigators conducting clinical trials. Turnover rates have continued to rise, and the highest and fastest growing proportion of performance deficiencies are associated with protocol noncompliance.

Yet sponsors and CROs, motivated in large part to support a strategic movement toward patient centric clinical trials, have a renewed interest in improving their site management capabilities and achieving more effective site collaborations. This report updates ongoing CSDD analyses of challenges and opportunities presented by the changing global investigative site landscape. See *Tufts CSDD Impact Report* 2005 May/June:7[3], *Tufts CSDD Impact Report* 2009 January/February:11[1], and *Tufts CSDD Impact Report* 2013 March/April:15[2].