





Global Clinical Trial Trends: What They Mean For ANZ

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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.

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Global Clinical Trial Trends: What They Mean For ANZ



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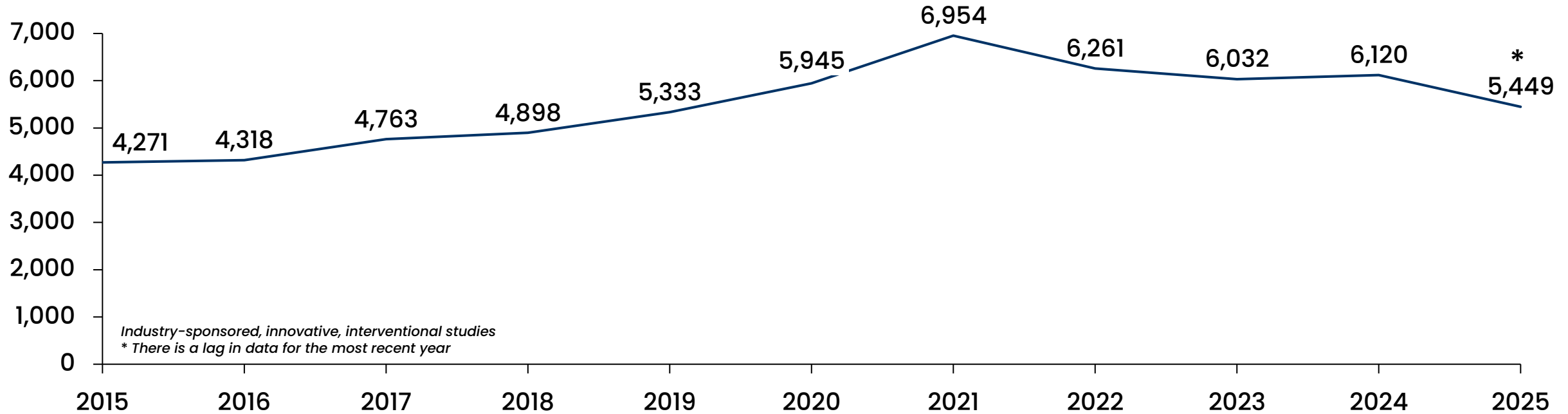
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Clinical Trial Trends In Australia & New Zealand

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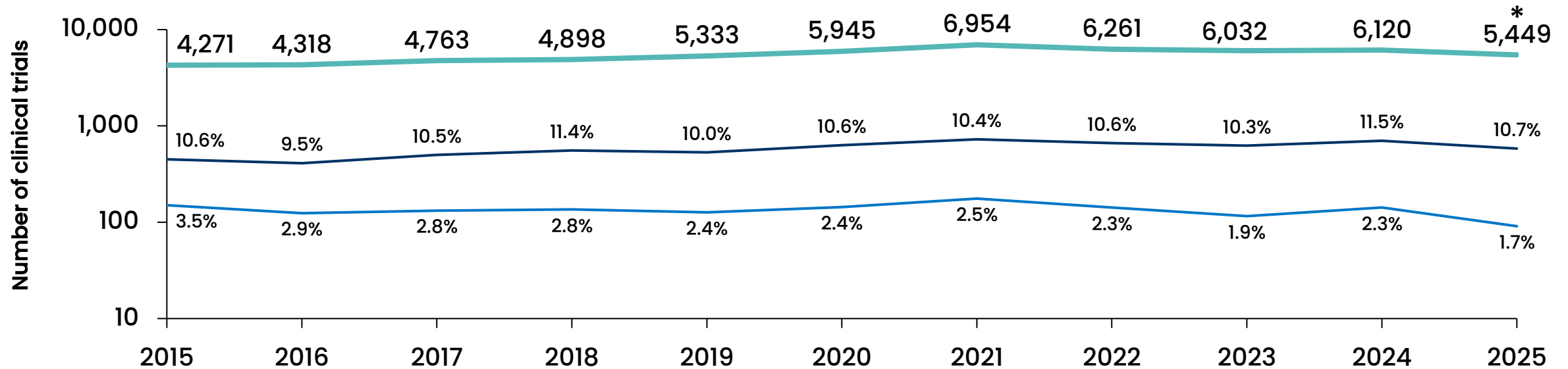
Globally, more clinical trials commenced in 2023 and 2024 than before the pandemic



- The number of global, industry-sponsored interventional trials has remained stable from 2022 to 2024.
- The number of global clinical trials exceeds the pre-pandemic peak



Australia's share of global clinical trials has increased and New Zealand's has decreased



Industry-sponsored, innovative, interventional studies

* There is a lag in data for the most recent year

— Australia — New Zealand — Global

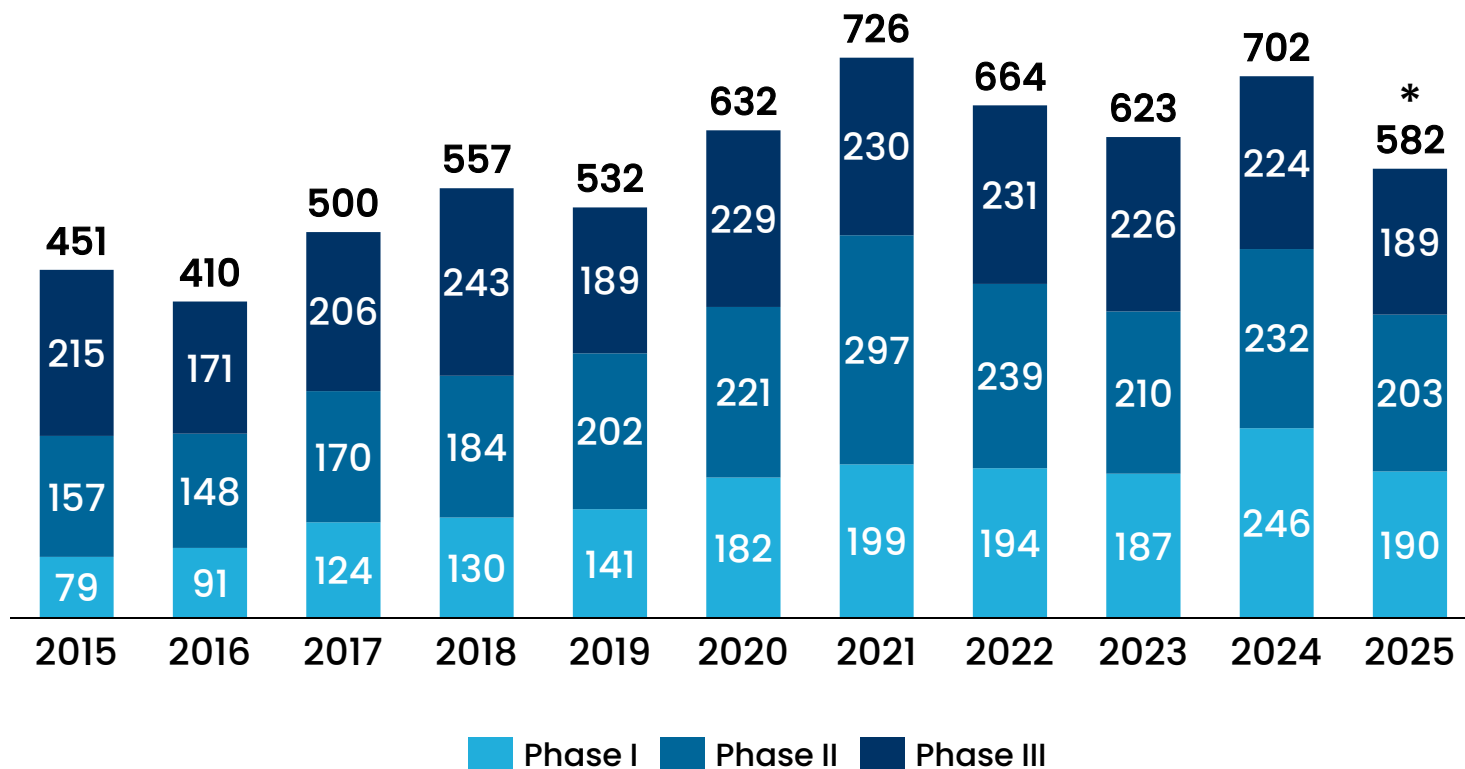
- Australia's share of clinical trials has remained between 10% and 11% in most years
- New Zealand's share of global studies was lower in 2022–2024 than before the COVID-19 pandemic



Australia's growth in clinical trials had been strongest in Phases I and II



Industry-sponsored clinical trials by year in Australia



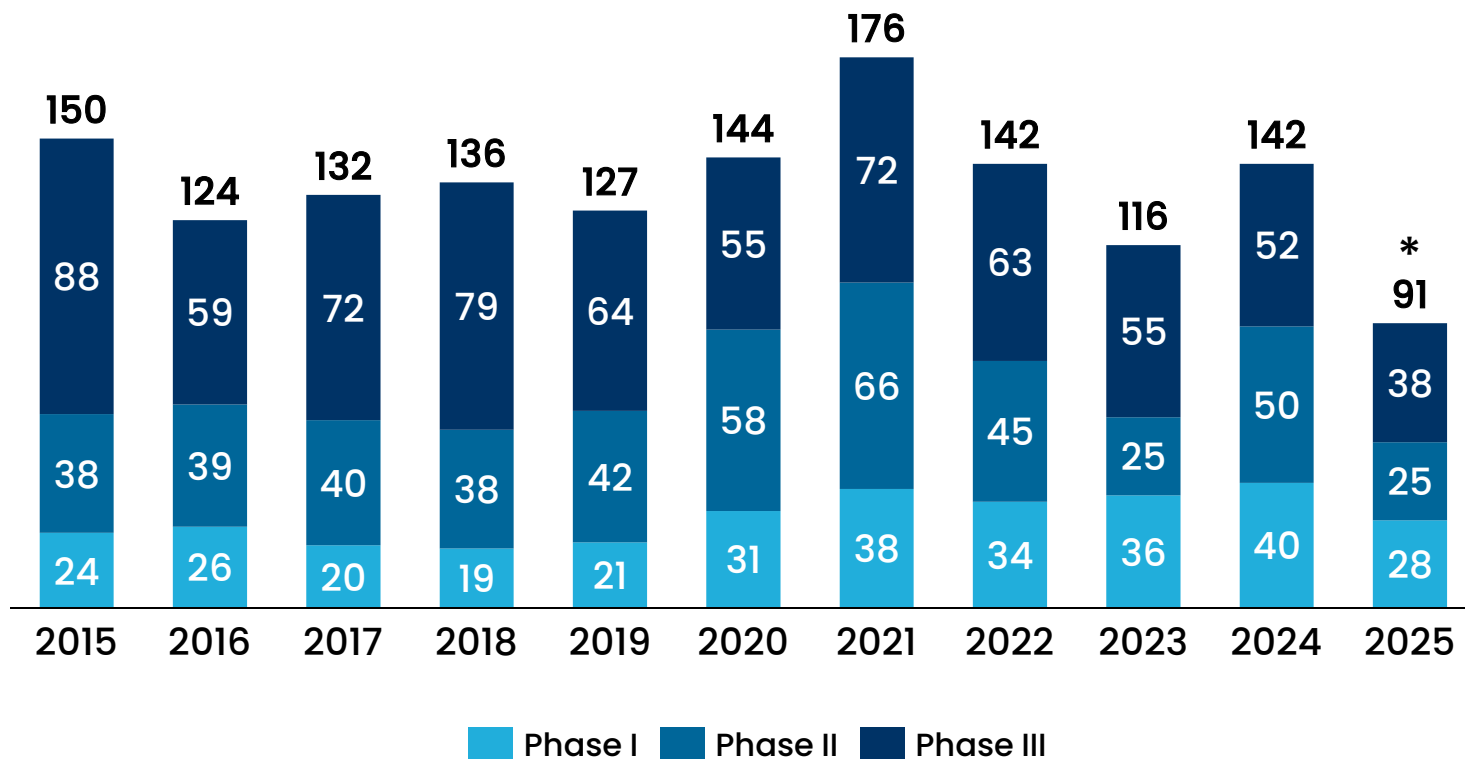
- Australia's clinical trial activity remains higher than before the COVID-19 pandemic
- Australia's Phase I studies in 2024 exceeded the COVID-19 peak
- Phase II studies have also grown significantly over the past decade

Industry-sponsored, innovative, interventional studies
* There is a lag in data for the most recent year

New Zealand has similarly experienced growth in Phase I clinical trials



Industry-sponsored clinical trials by year in New Zealand



- Clinical trial numbers in New Zealand are not significantly higher than before the COVID-19 pandemic
- Phase I studies have doubled since the COVID-19 pandemic

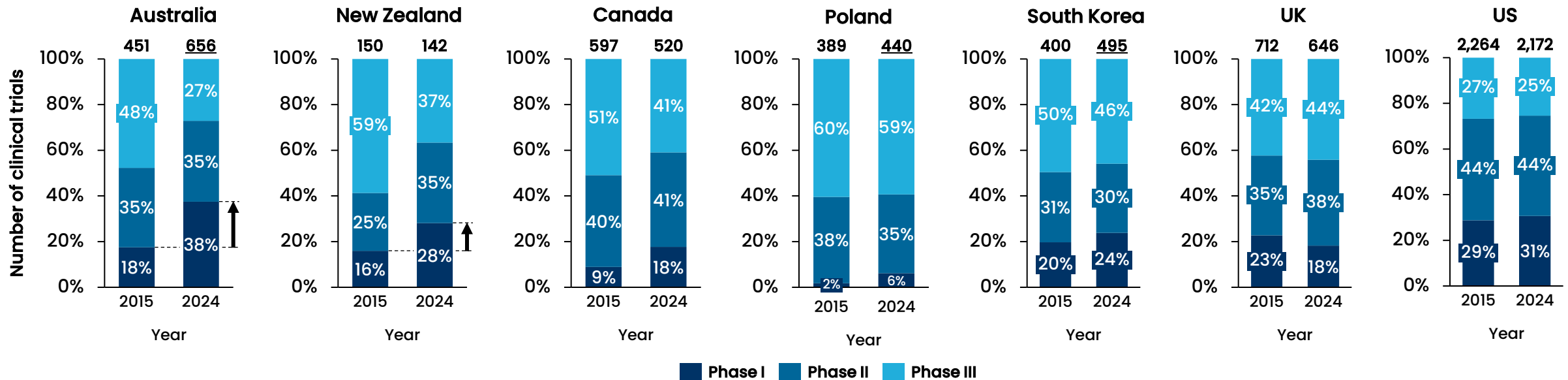
Industry-sponsored, innovative, interventional studies

* There is a lag in data for the most recent year



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The growth in Phase I and II studies in AU and NZ is not matched in other countries



Industry-sponsored, innovative, interventional studies

- Phase III studies account for a smaller fraction of trials in Australia and New Zealand than in the selected comparator countries
- New Zealand has experienced a reduction in Phase III studies, somewhat offset by an increase in Phase I and Phase II studies





Discussion:

The opportunities and challenges for ANZ sites

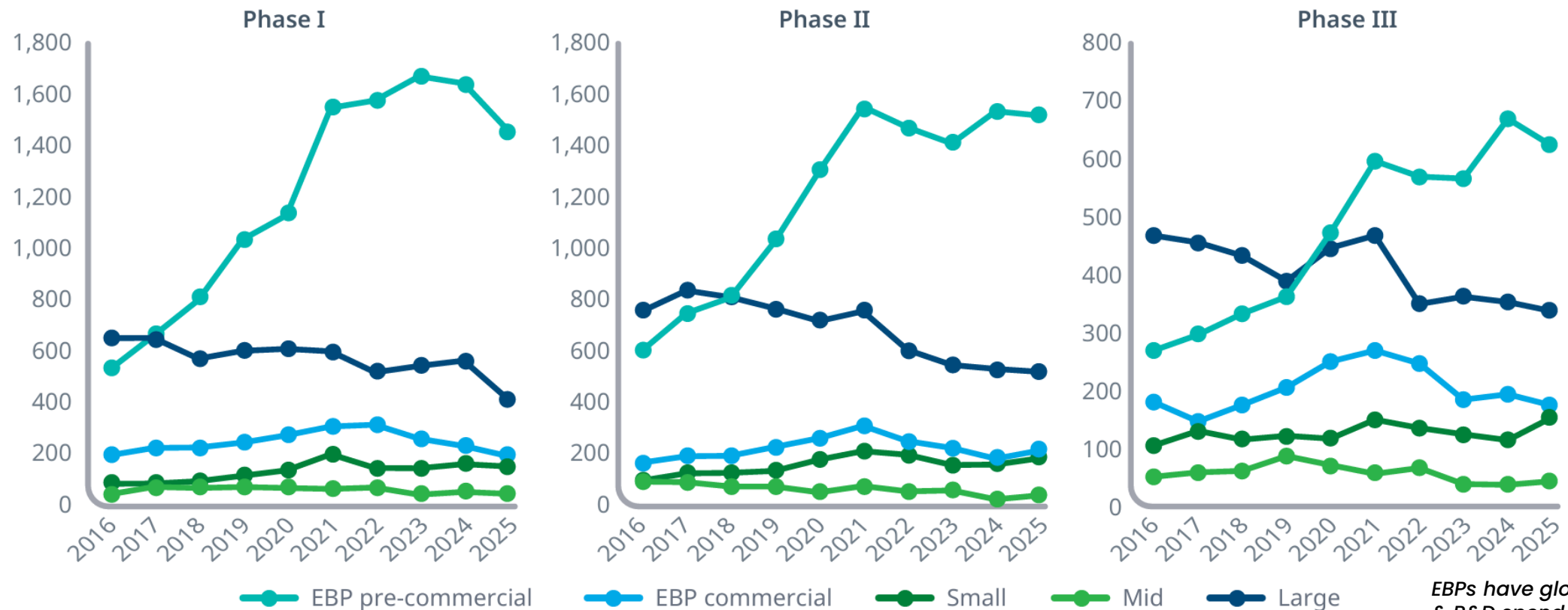


Emerging Biopharma (EBP) In Australia & New Zealand

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Over the decade, trial starts from EBPBs have grown dramatically across all phases

Clinical Trial starts by phase and company segment



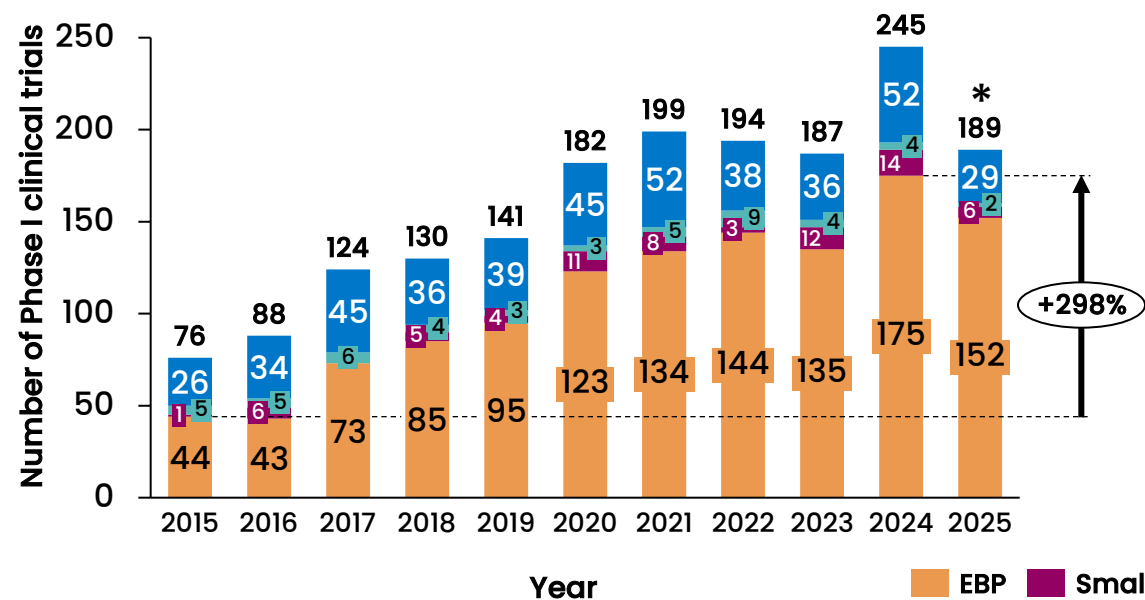
EBPs have global sales <US\$500M
& R&D spend <US\$200M p.a.



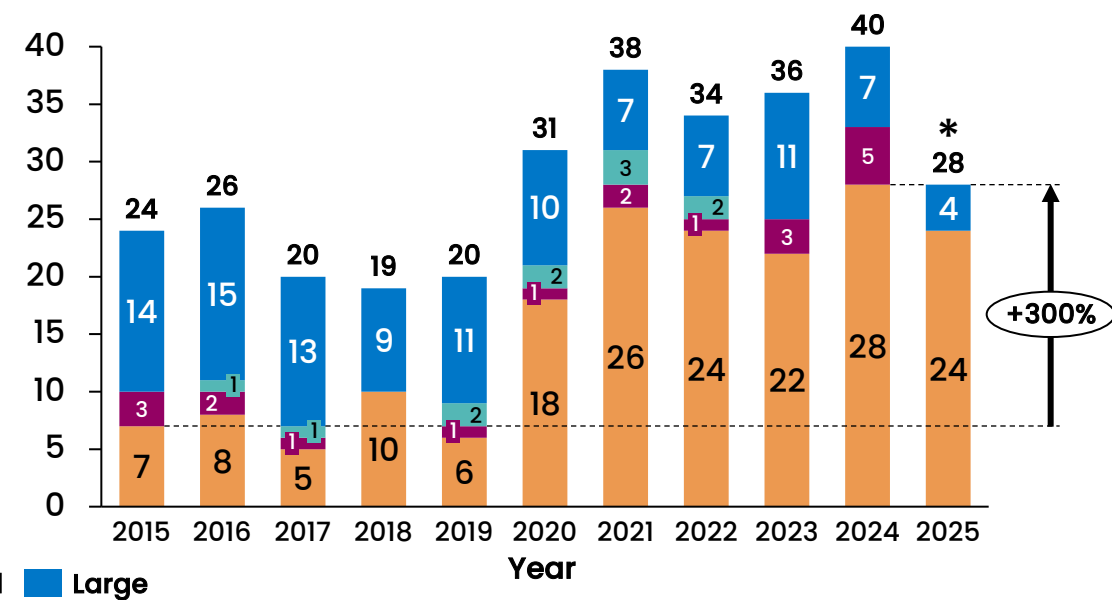
New Zealand and Australia have both experienced a 3x increase in EBP Phase I studies



Phase I industry-sponsored clinical trials
by year in Australia



Phase I industry-sponsored clinical trials
by year in New Zealand

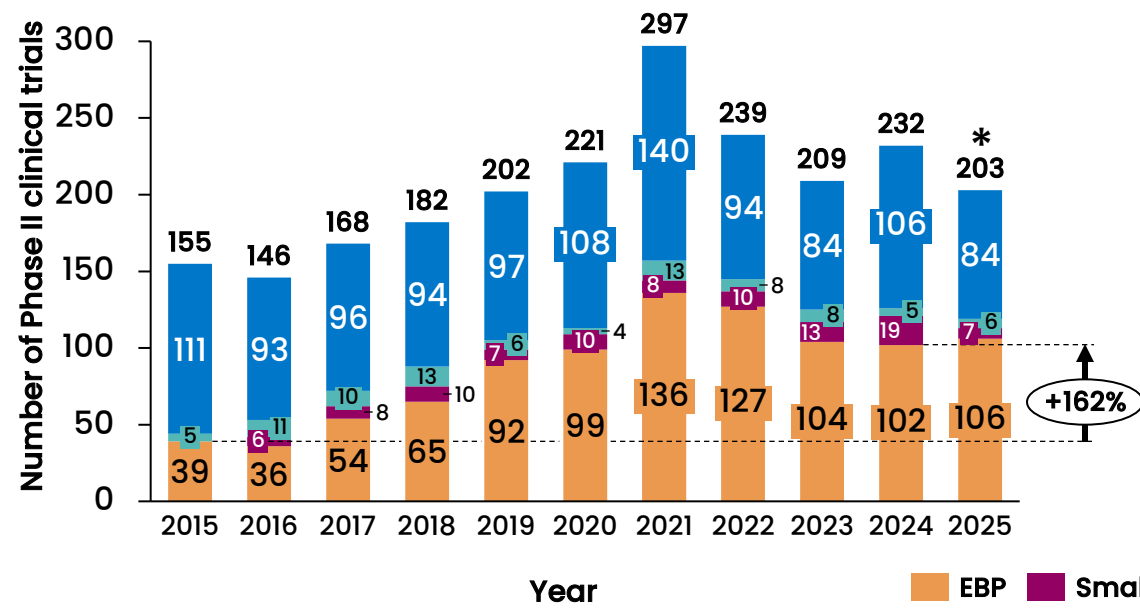


Industry-sponsored, innovative, interventional studies
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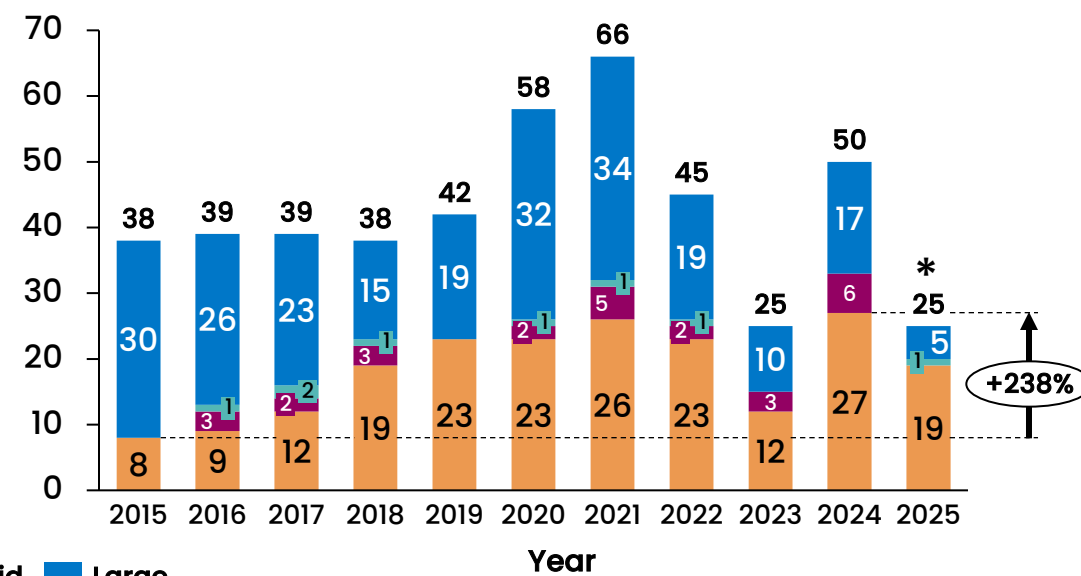
EBPs are an increasingly important sponsor of Phase II studies, especially in NZ



Phase II industry-sponsored clinical trials by year in Australia



Phase II industry-sponsored clinical trials by year in New Zealand

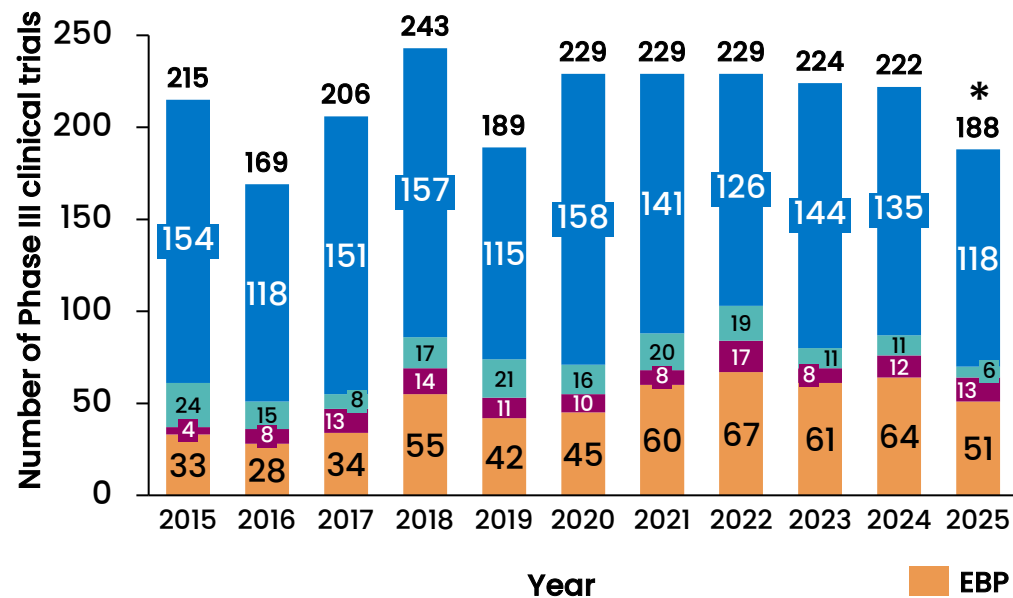


Industry-sponsored, innovative, interventional studies
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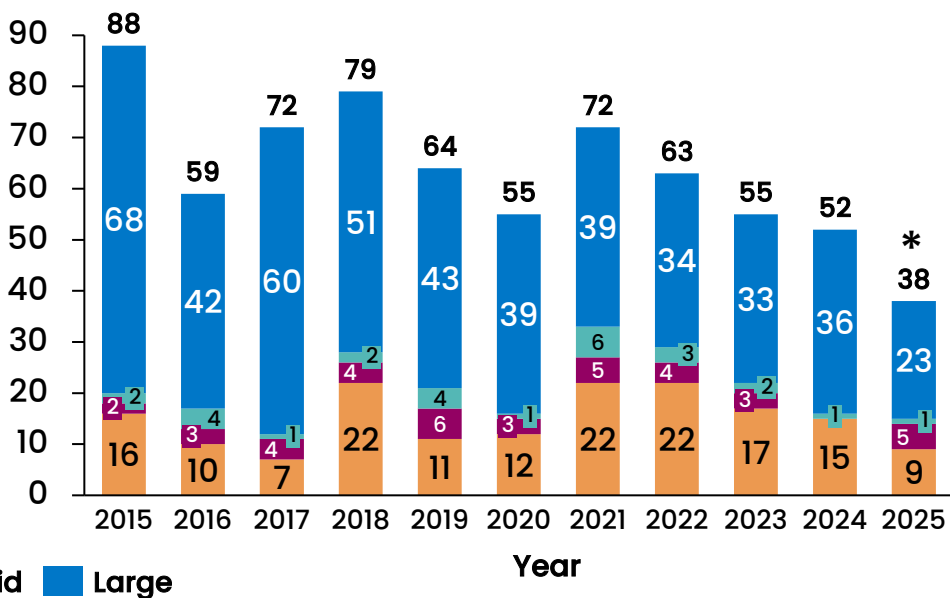
EBPs also account for a growing share of Phase III studies in Australia



Phase III industry-sponsored clinical trials by year in Australia



Phase III industry-sponsored clinical trials by year in New Zealand



Industry-sponsored, innovative, interventional studies
* There is a lag in data for the most recent year



Discussion:

Emerging biopharma (EBP) as a driver of clinical trial growth in ANZ

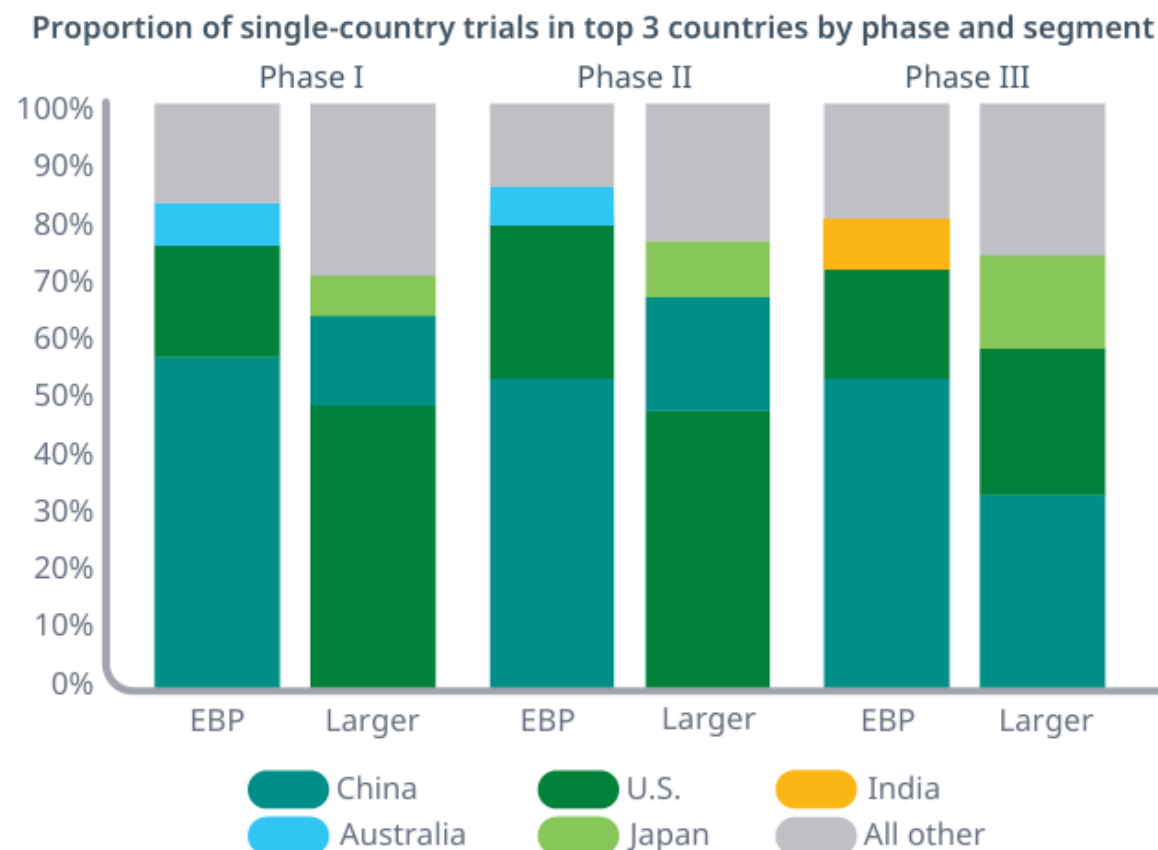
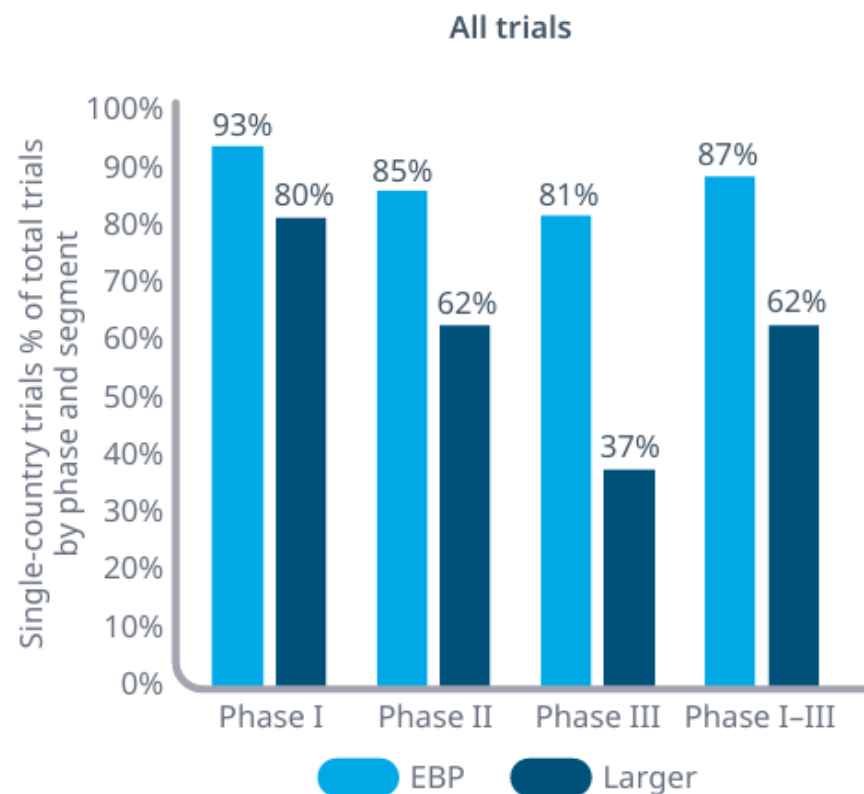


Single & Multi-Site Studies In Australia & New Zealand

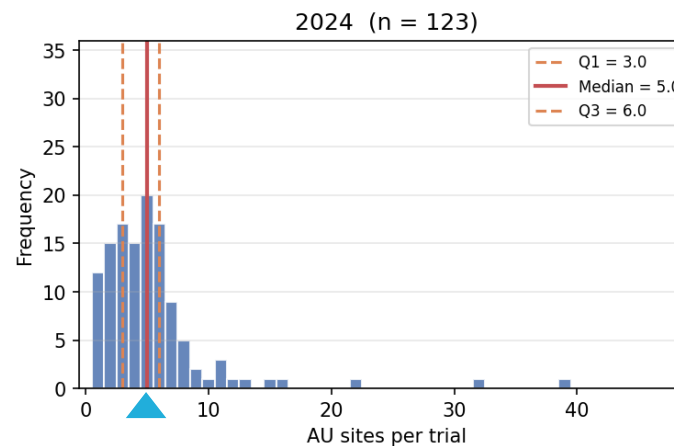
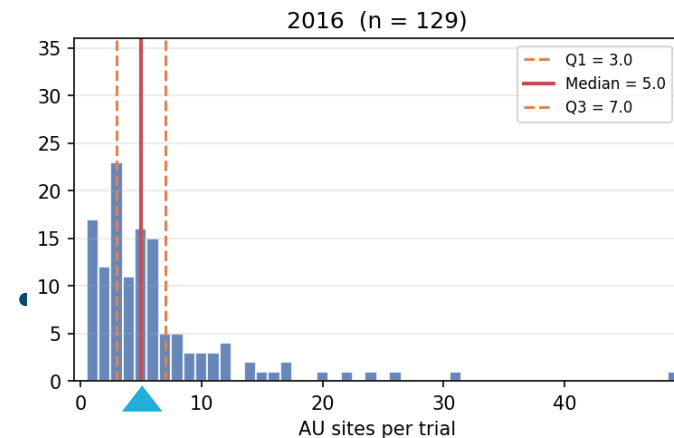
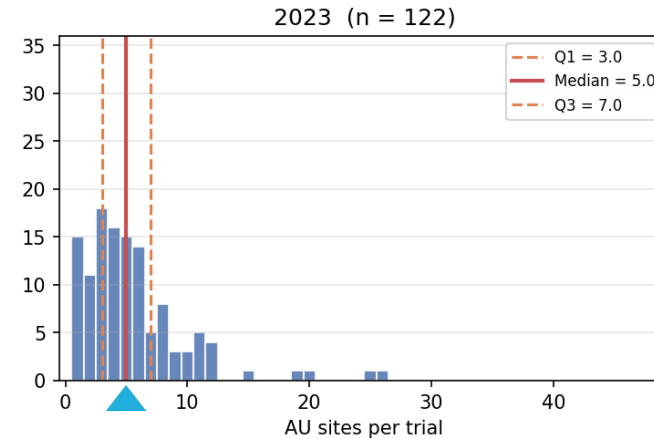
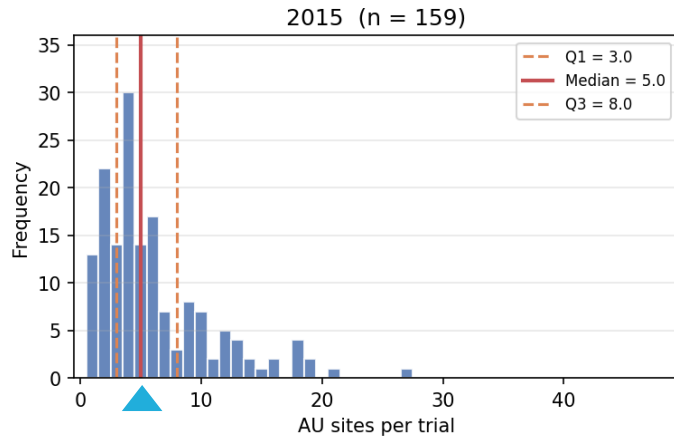
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Australia is a top-3 country for single country Phase I & II studies with EBP sponsors

Single-country trials by company segment and phase



Multi-country Phase III studies with Australian sites have a median of 5 AU sites per study

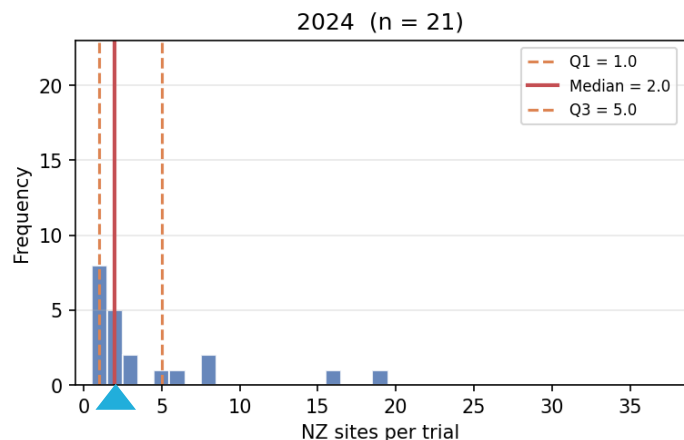
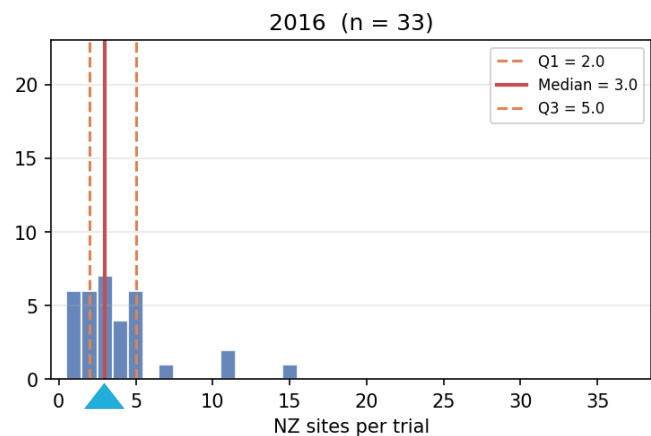
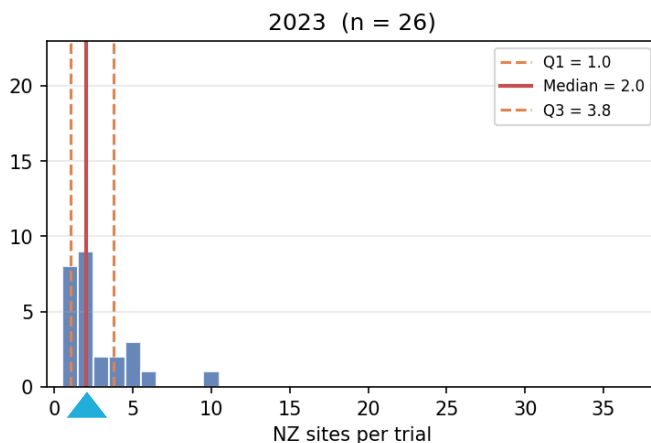
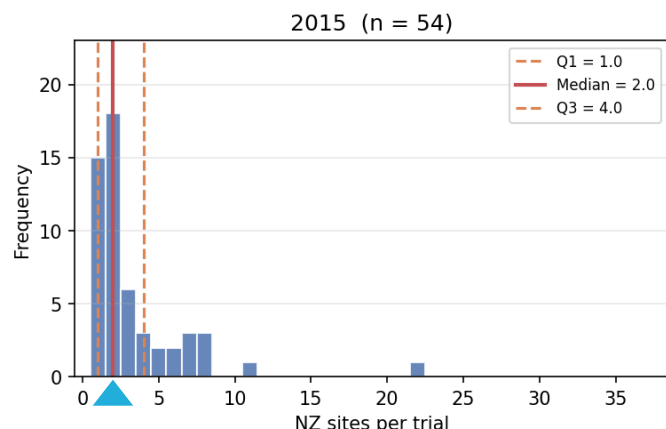


- The median number of Australian sites for Phase III multi-country studies with sites in Australia has remained at 5
- However, in 2014 and 2015, there were more Phase III studies with >10 sites than in 2023 and 2024.

*Industry-sponsored, innovative, interventional studies
Limited to multi-country studies with site locations recorded*



In New Zealand, 2 NZ sites is the median for Phase III multi-country studies with NZ sites



- The median number of NZ sites for Phase III multi-country studies has remained at 2
- The number of Phase III multi-country studies with New Zealand sites has reduced by at least one-third over the past decade

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Limited to multi-country studies with site locations recorded*





Discussion:

Trends in site selection in Australia and New Zealand



LOOKING AHEAD

Breakout Sessions I & II

A Smarter Trial Starts Here

Plenary Session

Patient Voice: The Other Side Of The Protocol



Site Appreciation Reception



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