

Clinical Trial Activity Report

2024

January — December

Australia's largest reviewer

Human Research Ethics Committees

Working across all phases of clinical and device trials, and social and behavioural studies, our teams support researchers in private, public, academic and government settings Australia-wide.

In 2024 Bellberry supported

~40%

of CTN
clinical
trials in
Australia



Since 2004 we have supported...

1,760+ research
organisations

7,080+ investigators
and site staff

11,250+ research
applications

Foreword

Bellberry is a national, independent, Not-For-Profit organisation that returns surplus funds to the medical research sector, supporting the advancement of research knowledge through philanthropy and education.

During 2024 we celebrated 20 years of excellence. The year was capped off when we were awarded Telstra National Business of the Year in the Category for Championing Health.

As the largest reviewer of clinical trials in Australia, Bellberry provides high quality, time-efficient, independent assessment and oversight for approximately 40% of Australia's Therapeutic Goods Administration (TGA) registered clinical trials.



Bellberry is the first Australian organisation to achieve accreditation by the global Association for the Accreditation of Human Research Protection Programs (AAHRPP).

The Bellberry Human Research Ethics Committees (HRECs) review a broad range of research activity, from clinical trials to social and behavioural science studies, and support researchers in private, public, academic and government settings Australia-wide. This report seeks to share insights from the clinical trials sector in Australia and the contribution Australia makes to global clinical trial activity. The 2024 Clinical Trial Activity Report is the sixth in a series of reports.



Data Boundaries

Bellberry Dataset

- Research approved by Bellberry HRECs (2024 calendar year).

Includes both clinical trials and other human research.

Approximately 40% of TGA Clinical Trial Notifications (CTNs).

Diverse and broad user base:

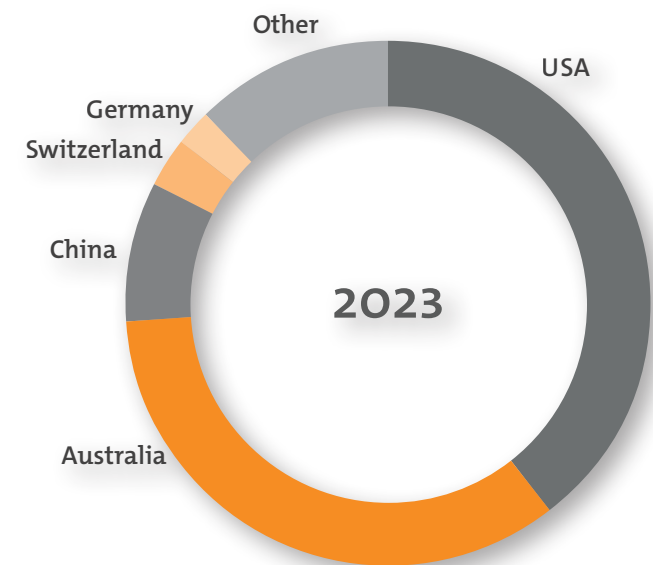
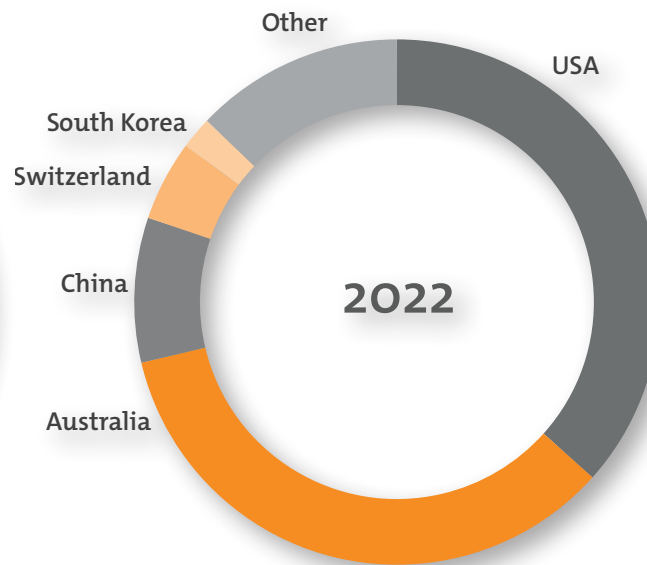
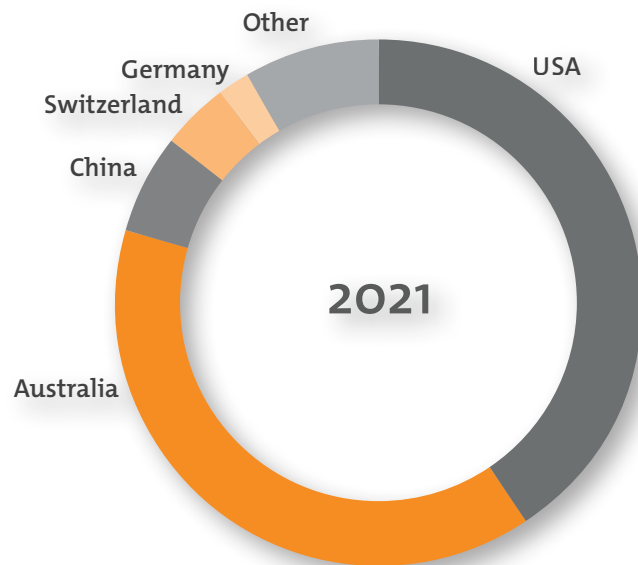
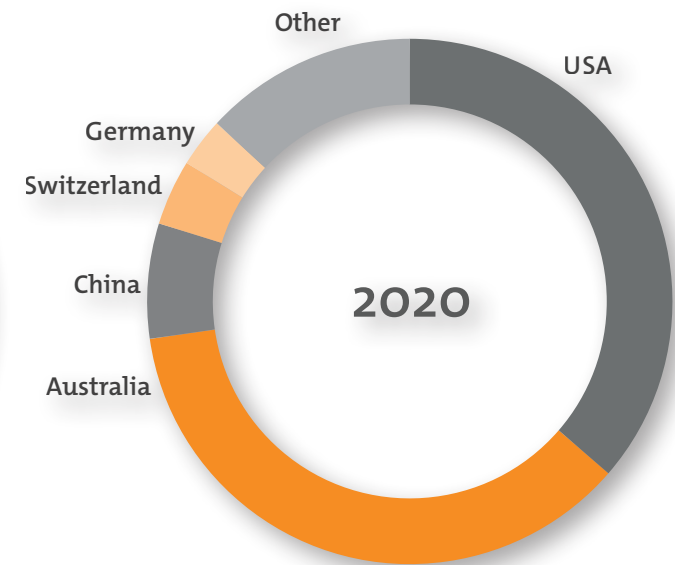
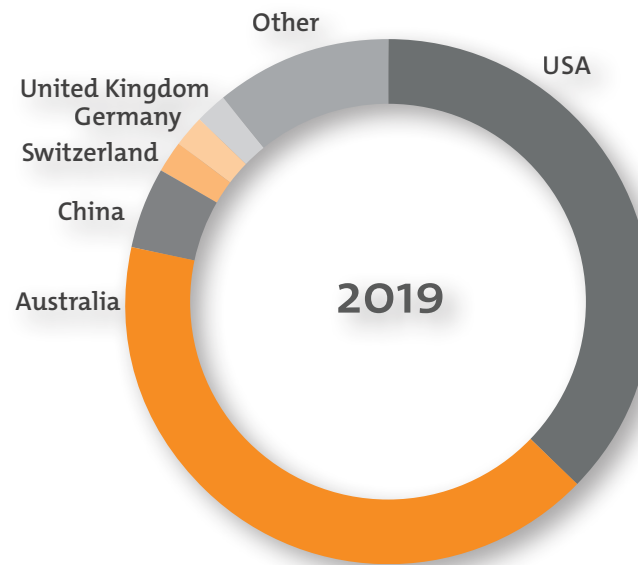
- Public Sector research
- Private hospitals and clinical providers
- Independent clinicians and researchers
- Government departments (at Commonwealth and State/Territory level)
- Primary care

Public-based research includes studies submitted under the NSW Early Phase Clinical Trial (EPCT) Framework, and by other public health jurisdictions (such as SA Health) and health districts (such as Austin Health) nationally.

International investment in all trials — 2019 - 2023

Bellberry data has been interrogated to identify the root source of funding for trials.

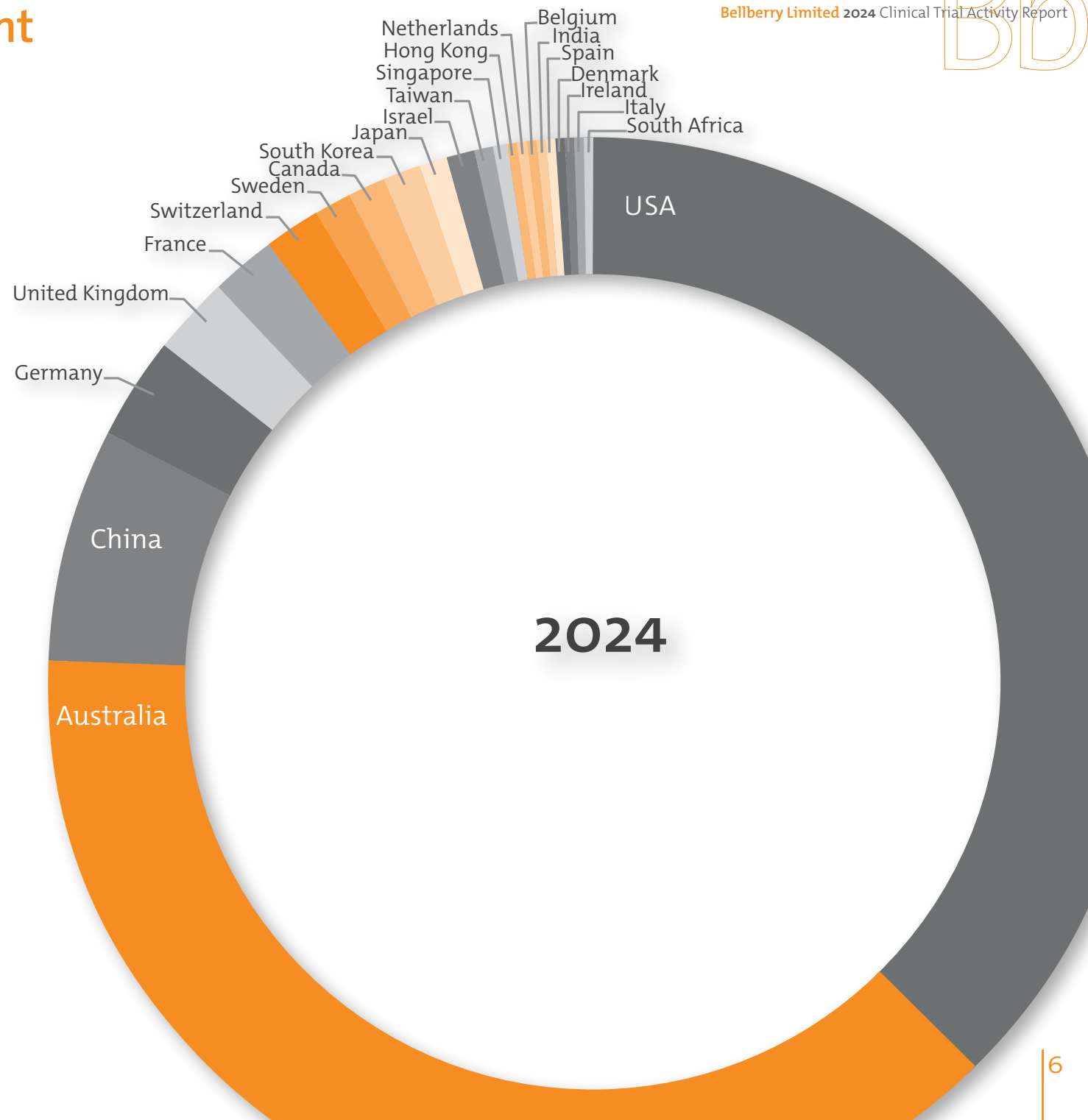
Over the five-year period, the top 10 international funders have remained largely consistent, but the top five funders have shifted positions year to year, reflecting dynamic investment patterns.



International investment in all trials — 2024

For 2024 we found:

- **Two-thirds** of all trials reviewed by Bellberry HRECs in 2024 were the result of **inward investment** attraction from international jurisdictions.
- **Australia is a top contributor** by submission volume each year.
- The **USA** continued to **maintain** the **top position** among international sponsors.
- **China** remains the **third-largest** source of international investment, a stable trend over the past six years.

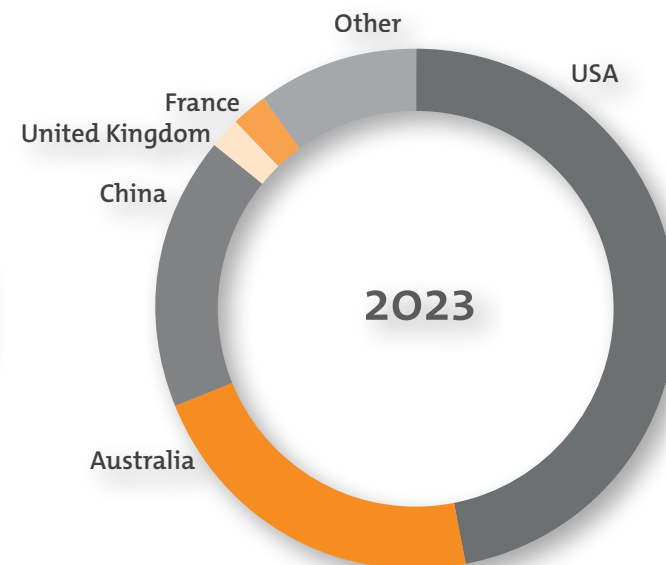
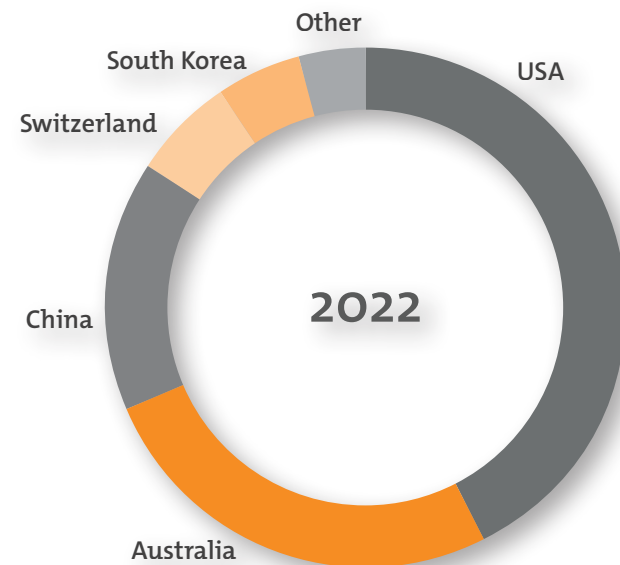
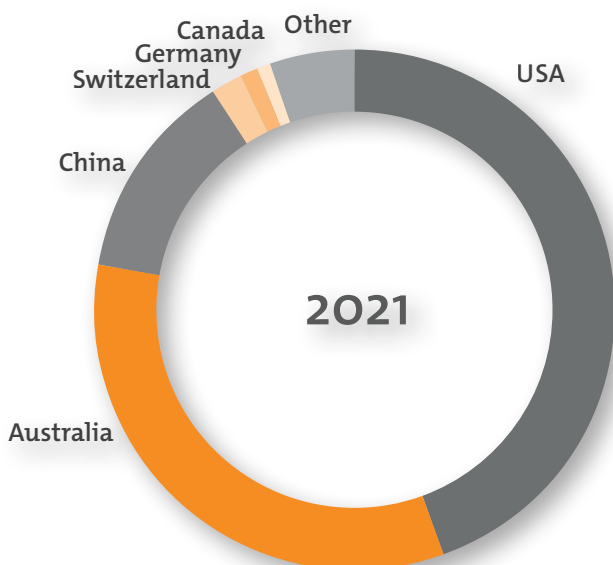
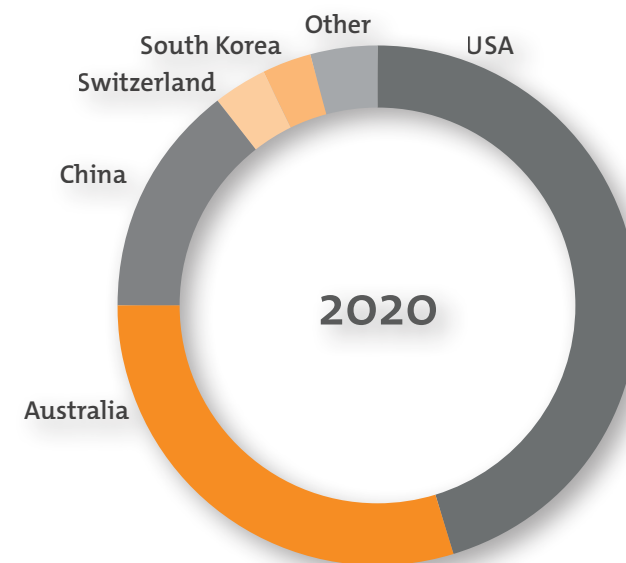
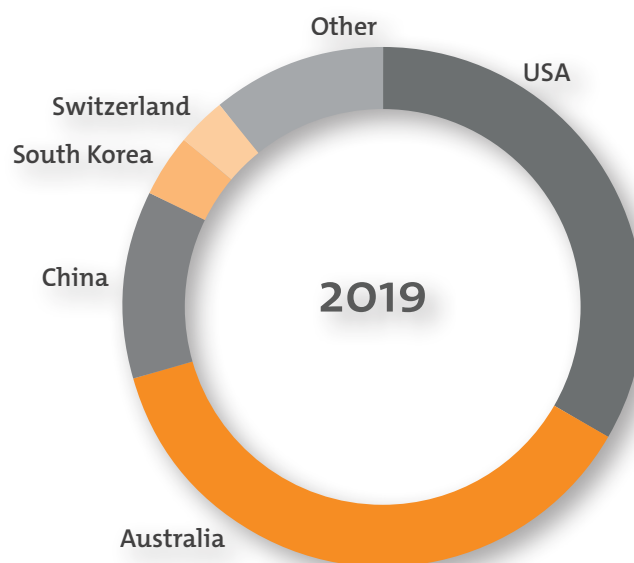


International investment in early phase trials — 2019 - 2023

Bellberry data has also been interrogated to identify the root source of funding for early phase trials.

Early phase trials are categorised as those including a First in Human (FIH) or Phase 1 component.

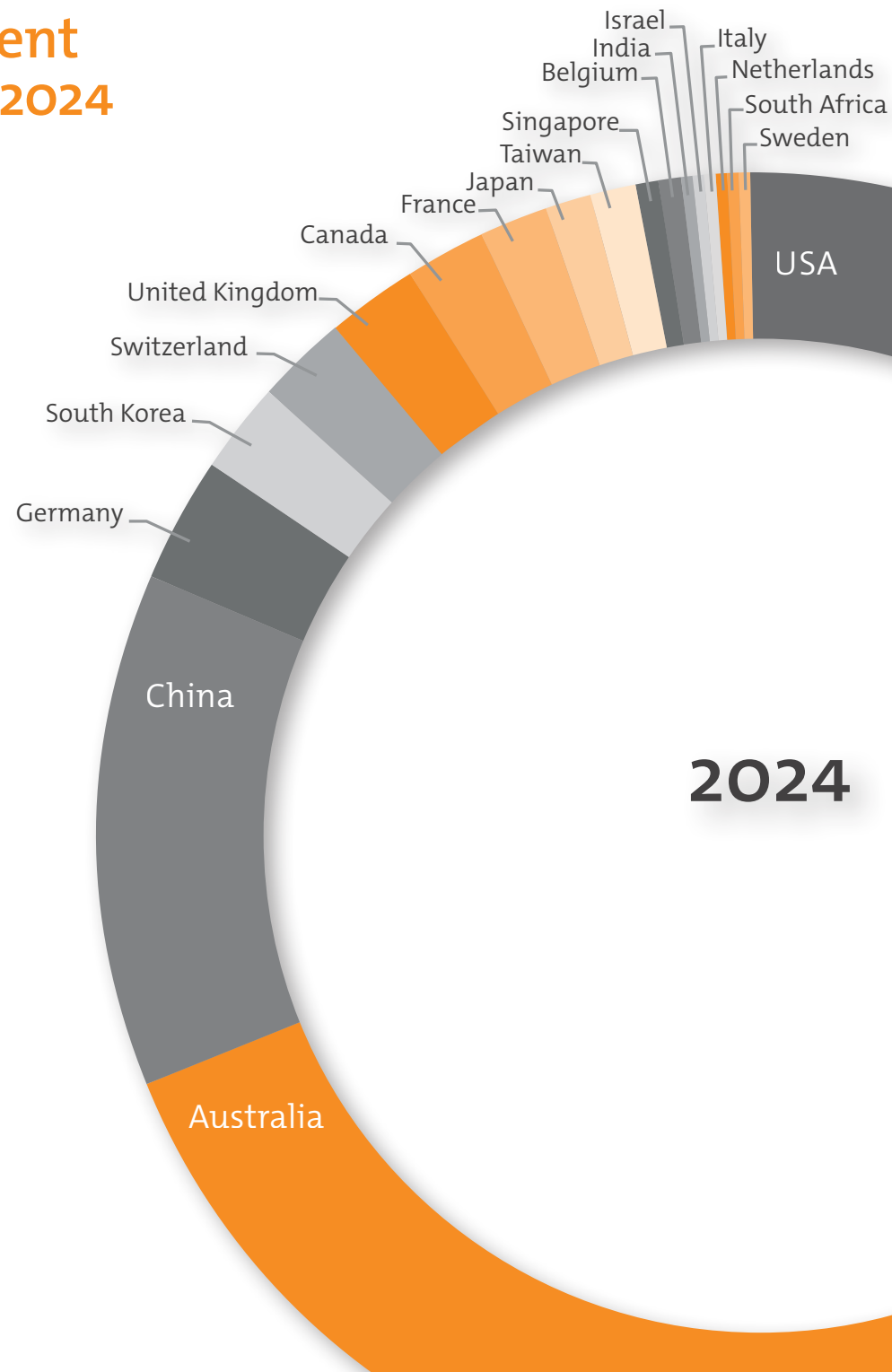
From 2019 – 2024, the top international funders again remained largely consistent, with the USA and China maintaining strong leadership.



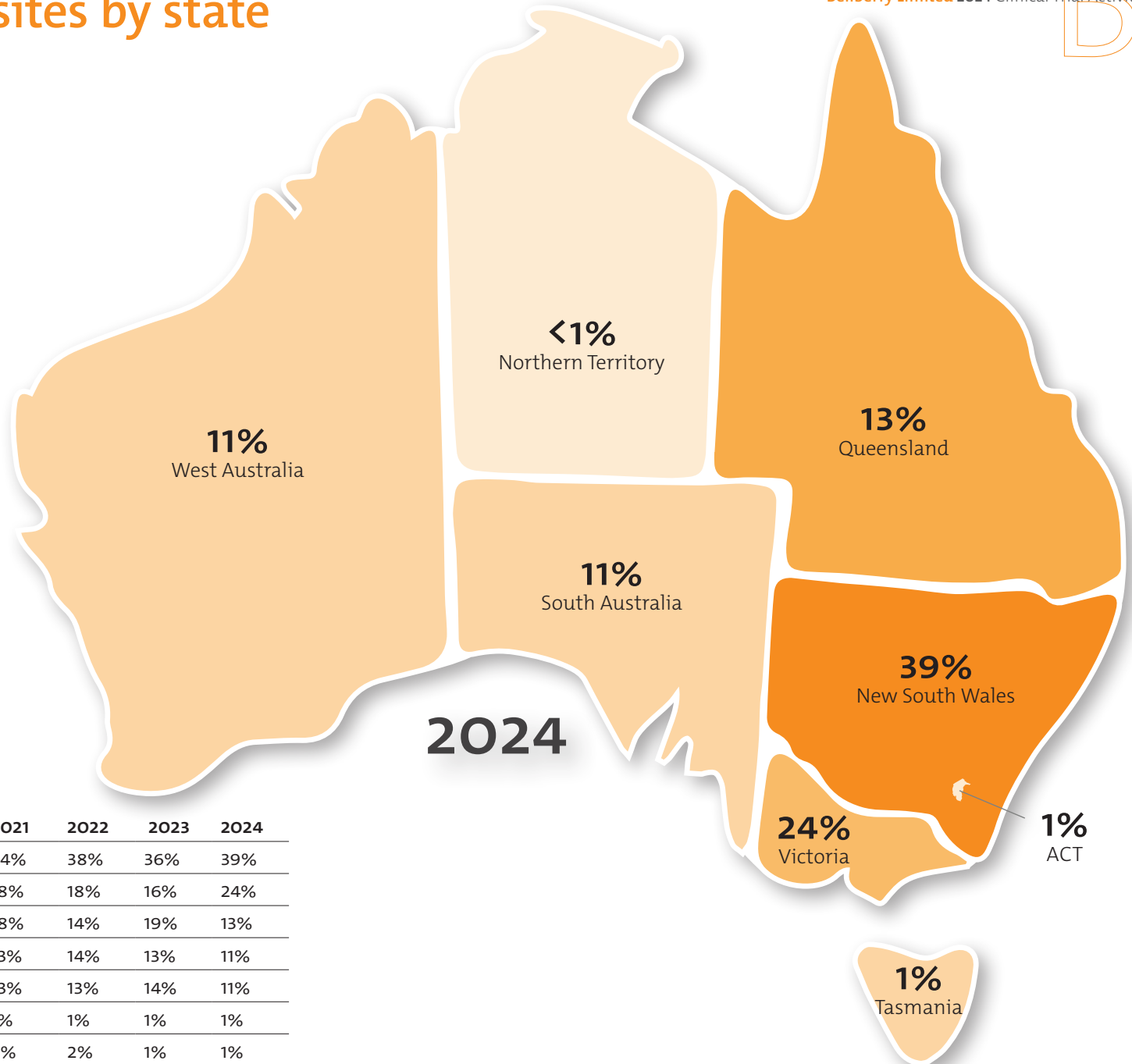
International investment in early phase trial — 2024

For 2024 we found:

- Three quarters of early phase trials in 2024 were funded by **non-Australian sponsors**, led by the **USA and China**, followed by **Germany, South Korea, Switzerland, Canada, England, France** and **Japan**.
- The **USA, Australia and China** have consistently ranked as the top three sponsors for the past six years.
- In 2024, the **USA was the largest contributor of all international early phase trials**, reflecting a stronger US focus on early-stage research.
- International early phase trial activity remains a key strength, with significant and continued growth over the six-year period.



Distribution of trial sites by state 2019 - 2024

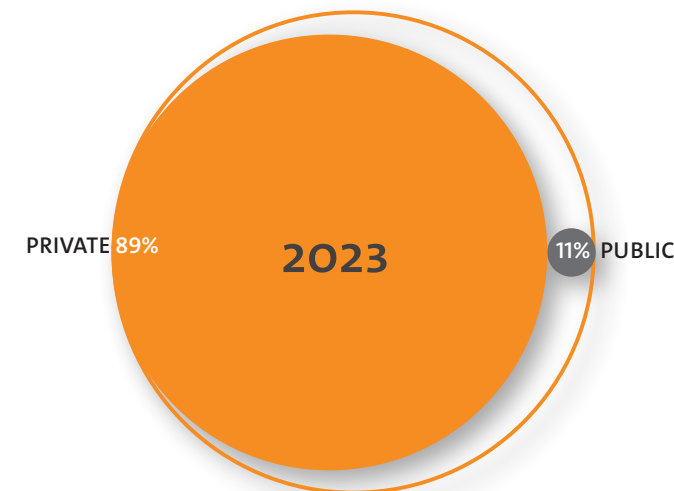
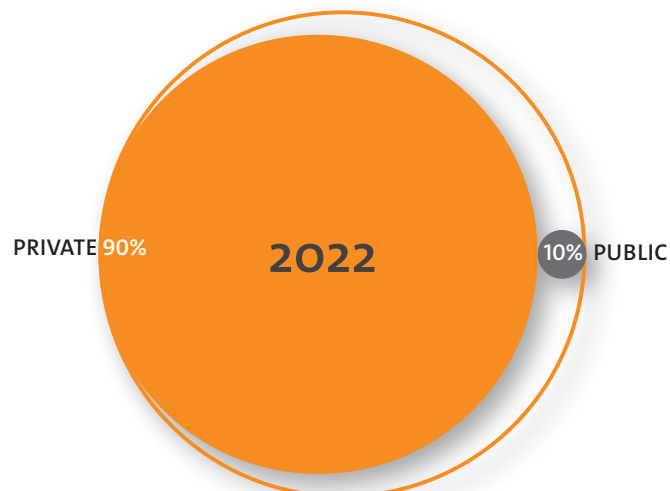
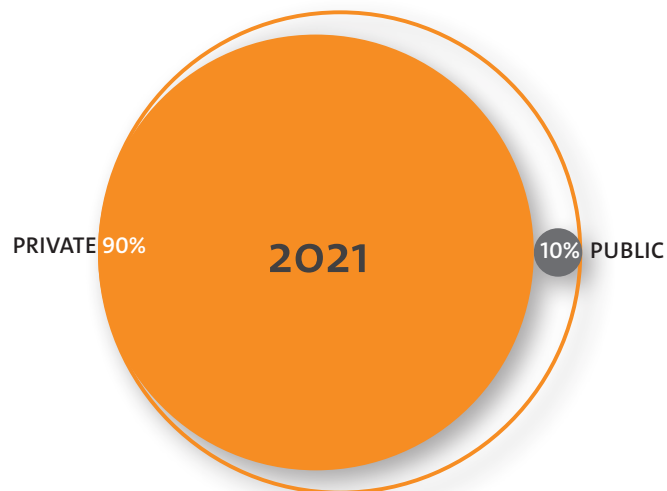
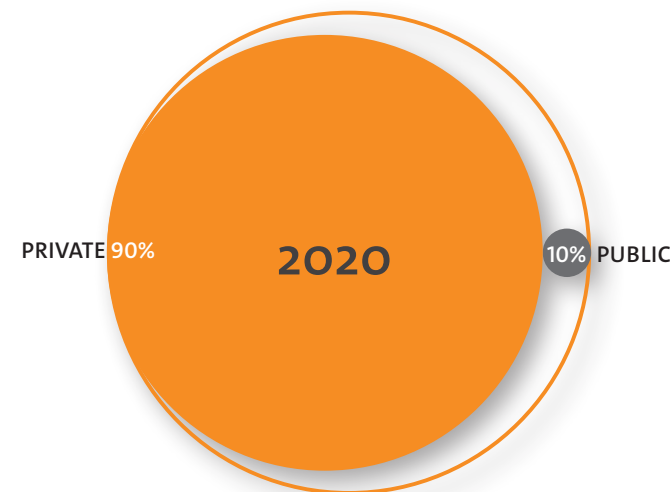
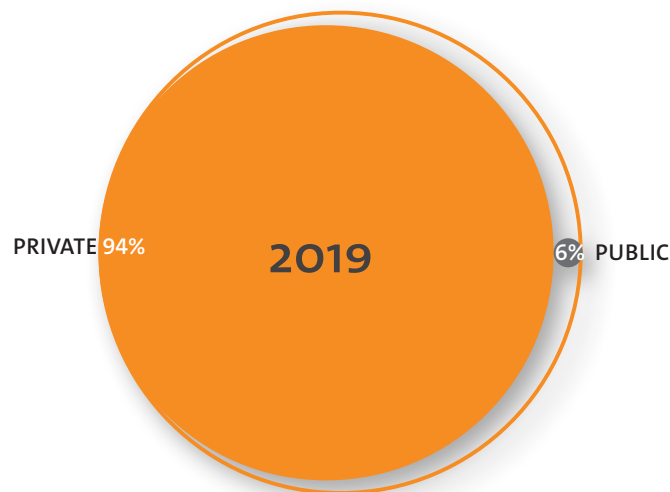


	2019	2020	2021	2022	2023	2024
New South Wales	37%	35%	34%	38%	36%	39%
Victoria	20%	17%	18%	18%	16%	24%
Queensland	19%	18%	18%	14%	19%	13%
South Australia	9%	11%	13%	14%	13%	11%
West Australia	14%	17%	13%	13%	14%	11%
Tasmania	0%	1%	1%	1%	1%	1%
Australian Capital Territory	1%	1%	2%	2%	1%	1%
Northern Territory	0%	0%	0%	0%	0%	<1%

Note: Percentages are rounded and may not total 100%.

Distribution of lead trial sites 2019 - 2023

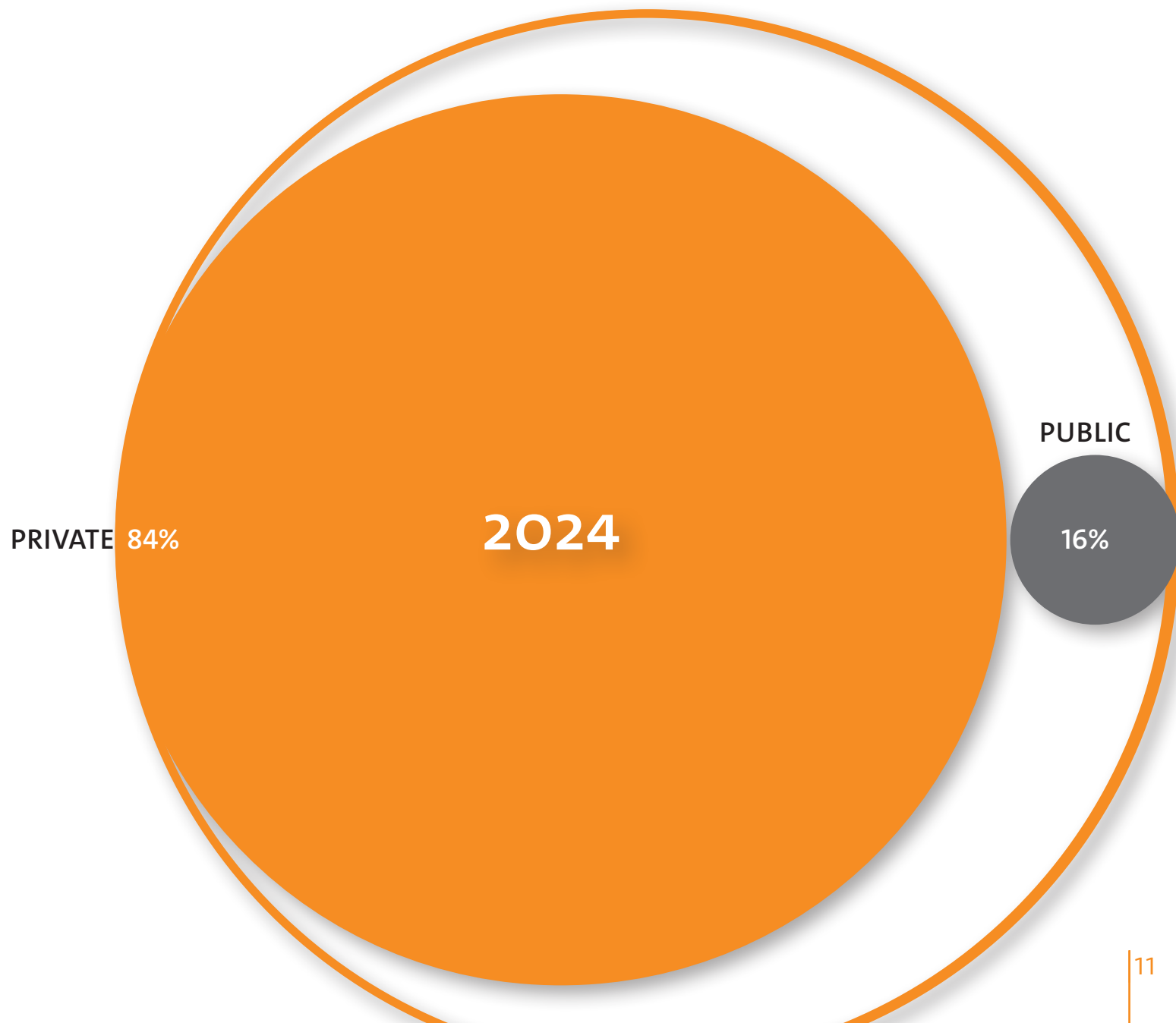
Private sites range from small clinics through to hospitals, and also include university research; while public is defined as research based at public health funded sites.



Distribution of lead trial sites 2024

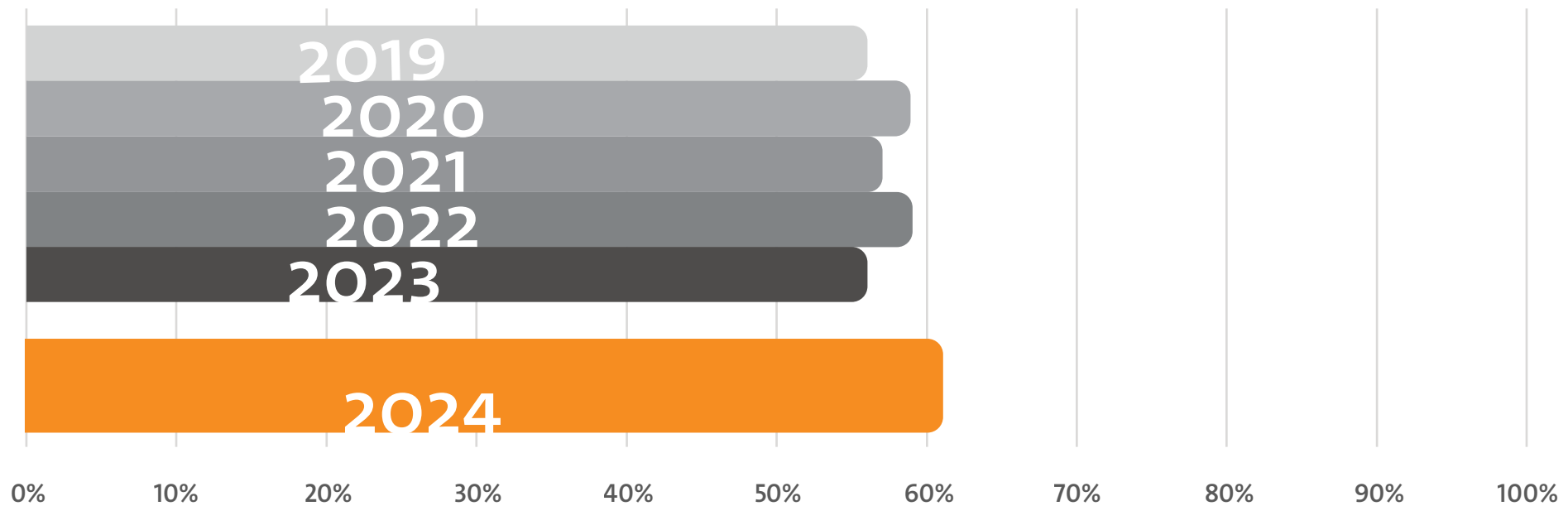
For 2024 we found:

- The majority of applications submitted to Bellberry HRECs continue to nominate a private site as the lead site.
- A steady increase in applications from public lead sites since 2019 can be attributed to growing acceptance from public institutions, as well as a shift in which organisations are taking on lead site responsibility.



Single-centre trials 2019 - 2024

The proportion of **single-centre trials** has remained relatively steady over the past six years.



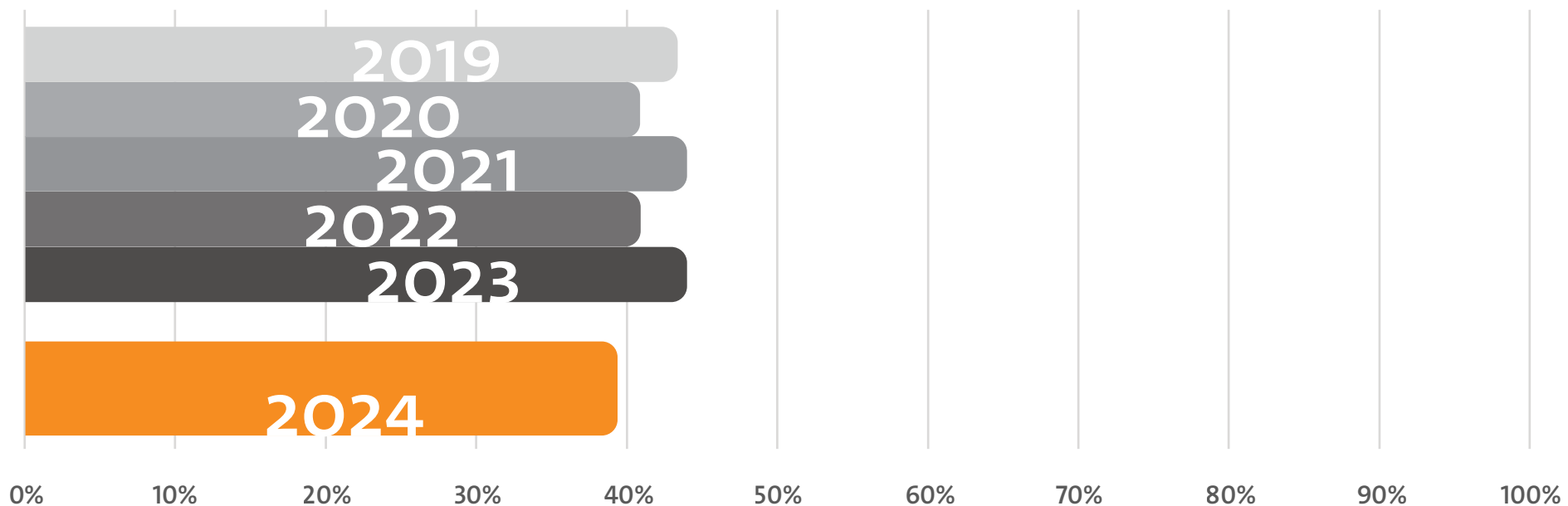
Multi-centre trials

2019 - 2024

Bellberry HRECs have been providing single ethical review for multi-centre trials since 2005.

Single ethical review of multicentre trials is a method by which we reduce duplication in the research sector.

Multi-centre studies have consistently represented a significant share of applications reviewed by Bellberry HRECs, underscoring Australia's capacity to support coordinated, multi-site research.

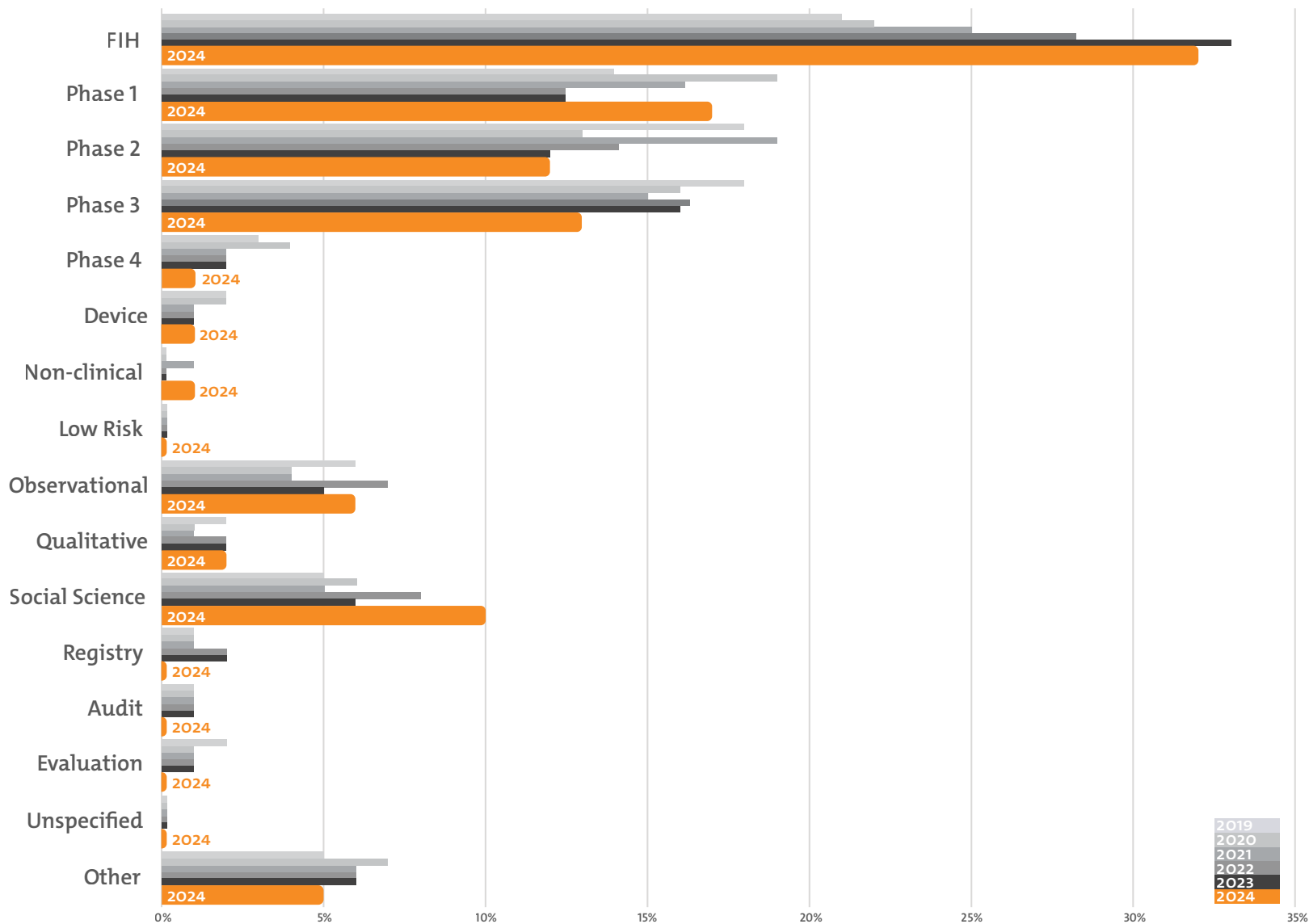


Distribution of trials by categories

Since 2019, Bellberry applications consistently highlight Australia's strength in early-phase clinical trials.

These insights also demonstrate Australia's broader ability to support the full clinical development pathway.

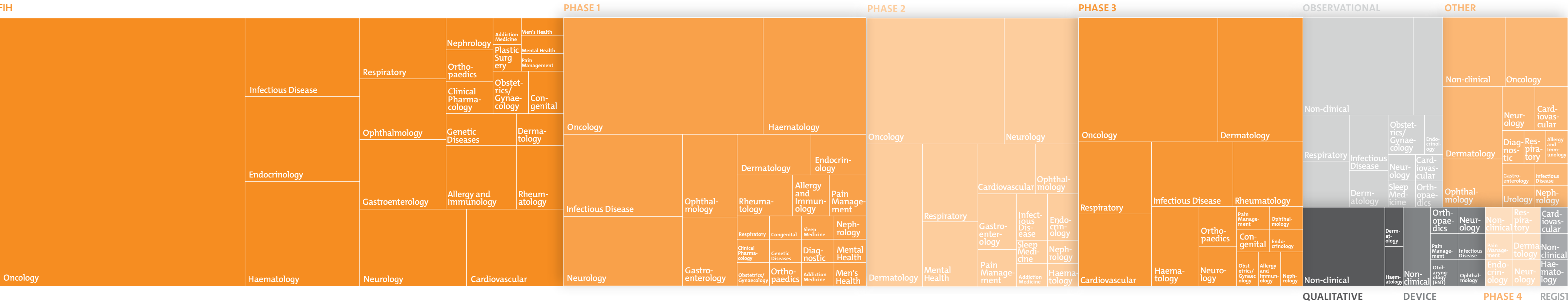
The proportion of social science trials has doubled between 2019 and 2024.



Distribution by phases and therapeutic areas

2024

Oncology continues to lead across all phases, consistent with previous years.



Distribution of trials by therapeutic areas

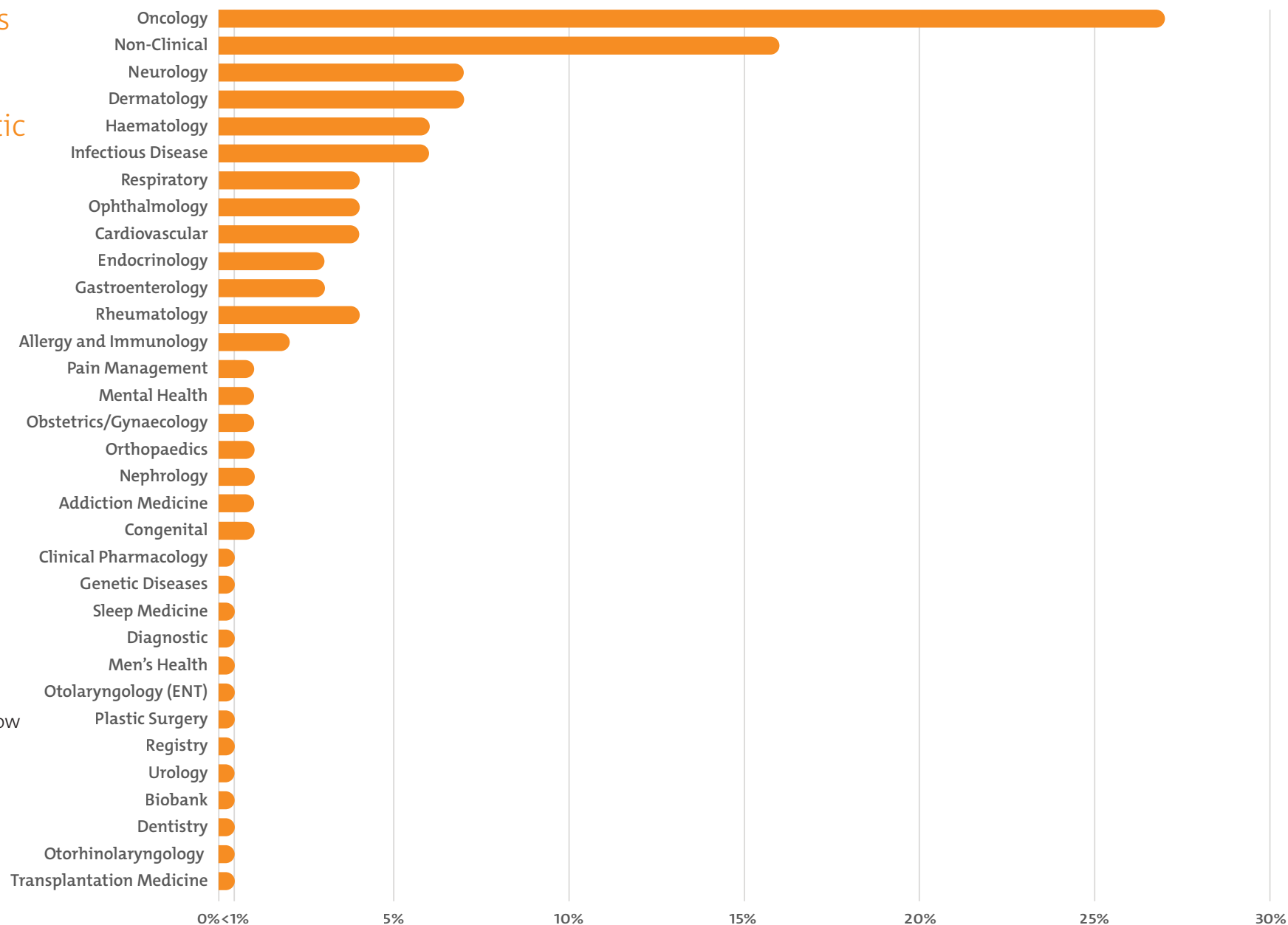
2024

Australia continues to support trials across a broad range of therapeutic areas, reflecting the strength of its research sector.

Oncology has remained the top therapeutic area in Bellberry-reviewed trials since 2019, highlighting Australia's strength in early-phase oncology research.

In 2024, **non-clinical trials** and **neurology** were also prominent, with steady activity in **dermatology**, **infectious disease**, and **haematology**.

Smaller numbers of trials in areas like **addiction medicine**, **gastroenterology**, **mental health**, and **endocrinology** show Australia's ability to support emerging clinical priorities.



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