

Recovering from Covid:

The **2021** Clinical Research Market

An overview of trends in the industry
covering 2018, 2019, 2020 and 2021

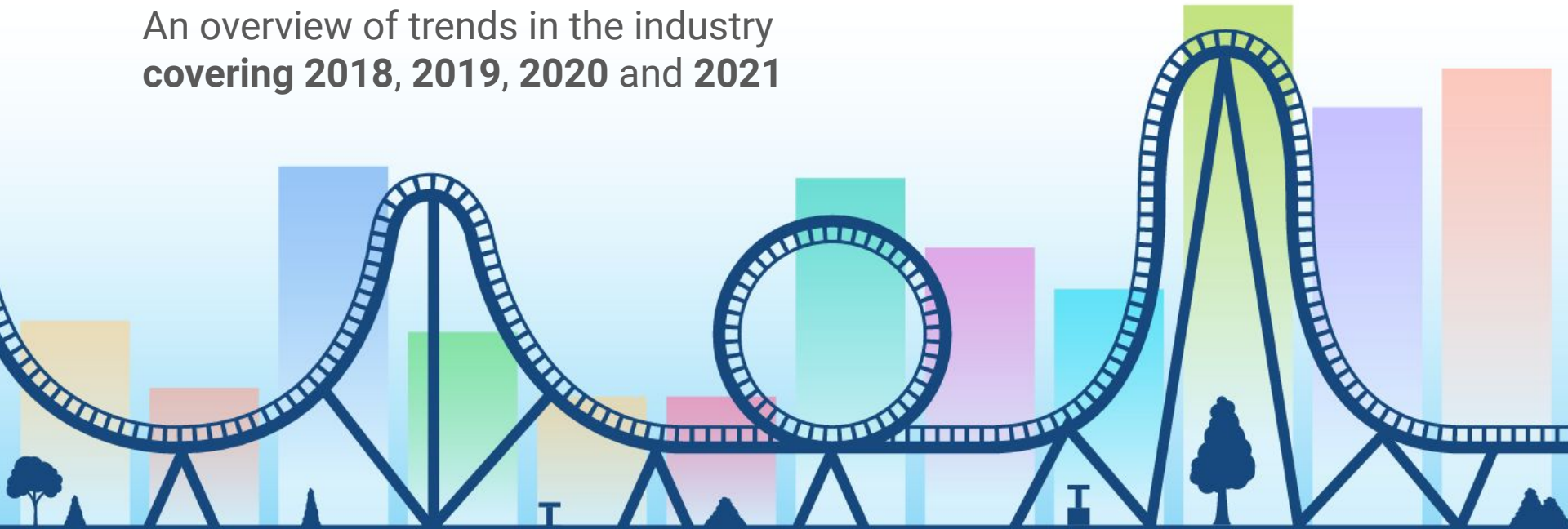



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Methodology

The data collected for this whitepaper comes from TrialHub - a clinical trial feasibility platform that aggregates data from all 17 clinical trial registries and thousands of trusted sources in real-time.

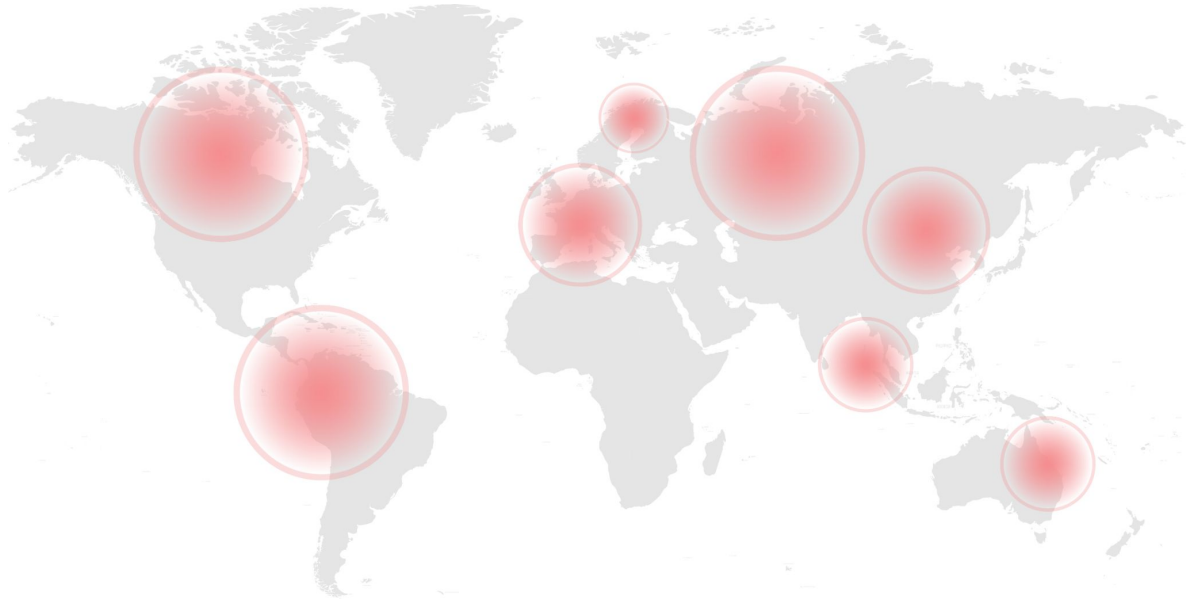
TrialHub works with the MeSH system of categorizing diseases.

Under MeSH, one and the same disease can belong to 2 or more different TAs. Keep this in mind when reading the data as the sum of all trials by TAs in a given year could be greater than 100% for this reason.

When applicable we have renamed the TA (Cardiovascular diseases = Cardiology), however, in some cases this is not possible so we have kept the MeSH terminology (Autoimmune diseases doesn't always = Immunology).

Regions and countries

In this white paper, when we speak of certain regions, these are the countries that fall under them.



North America

- United States
- Canada



Latin America

- Argentina
- Brazil
- Chile
- Colombia
- Dominican Republic
- Ecuador
- Guatemala
- Mexico
- Panama
- Peru
- Puerto Rico



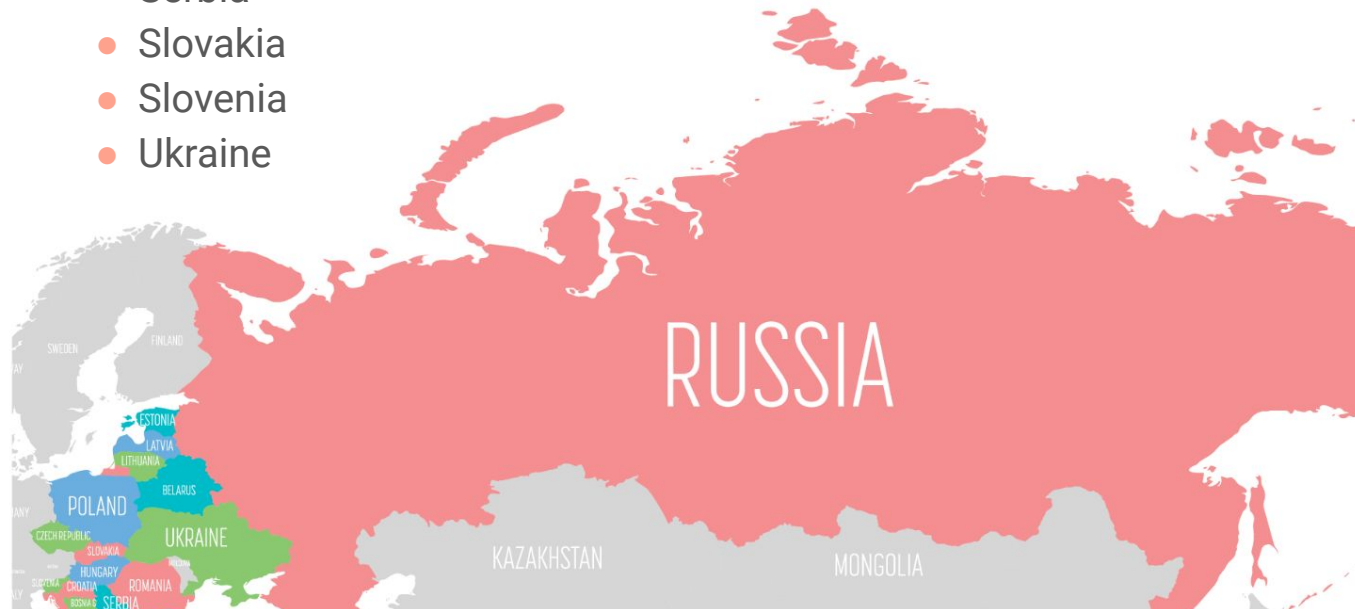
Western Europe

- Austria
- Belgium
- France
- Germany
- Ireland
- Italy
- Netherlands
- Portugal
- Spain
- Switzerland
- United Kingdom



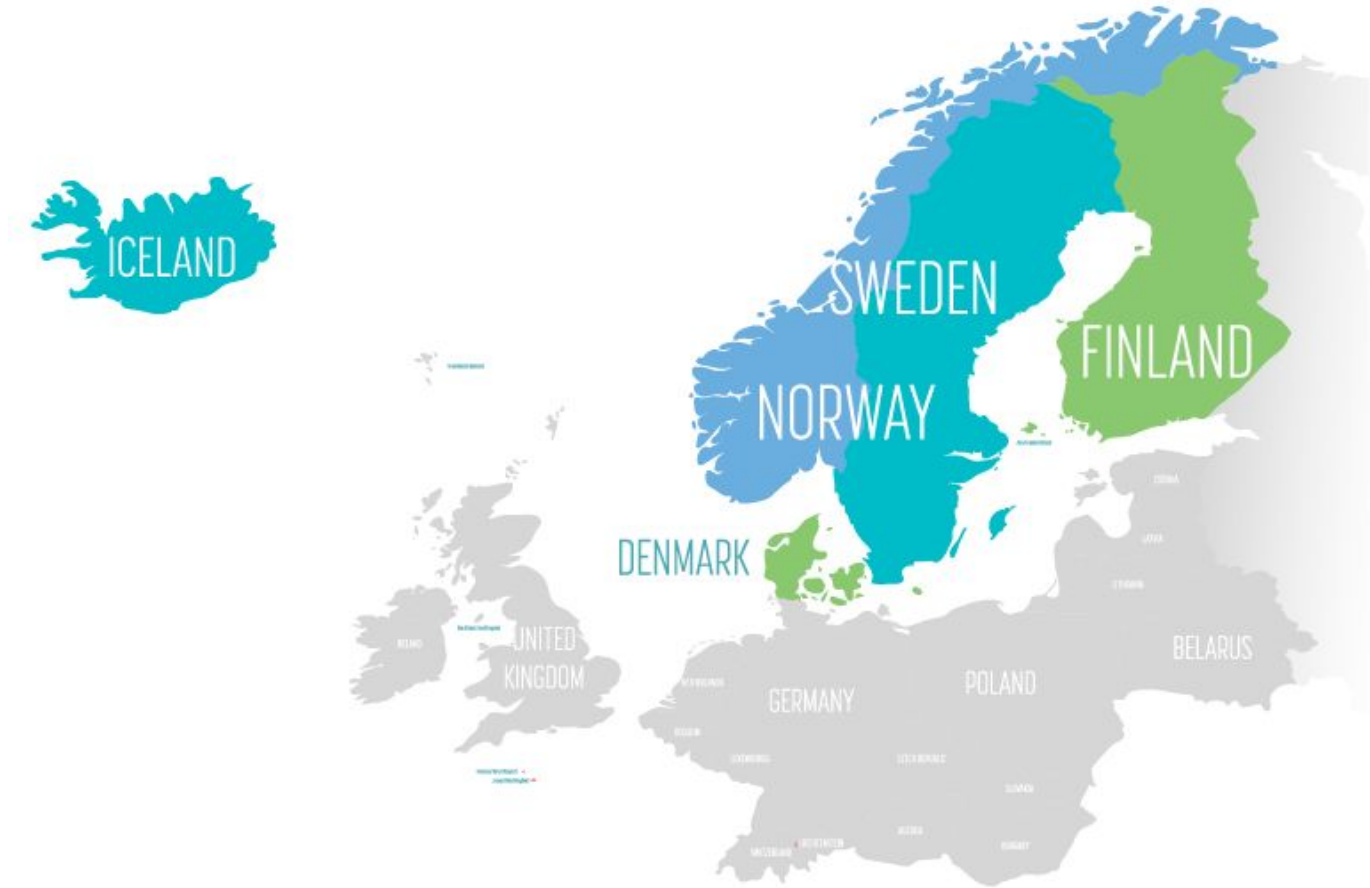
Central and Eastern Europe (CEE)

- Bosnia & Herzegovina
- Bulgaria
- Croatia
- Czechia
- Estonia
- Georgia
- Hungary
- Latvia
- Lithuania
- Macedonia
- Poland
- Romania
- Russia
- Serbia
- Slovakia
- Slovenia
- Ukraine



Scandinavia

- Denmark
- Finland
- Norway
- Iceland
- Sweden



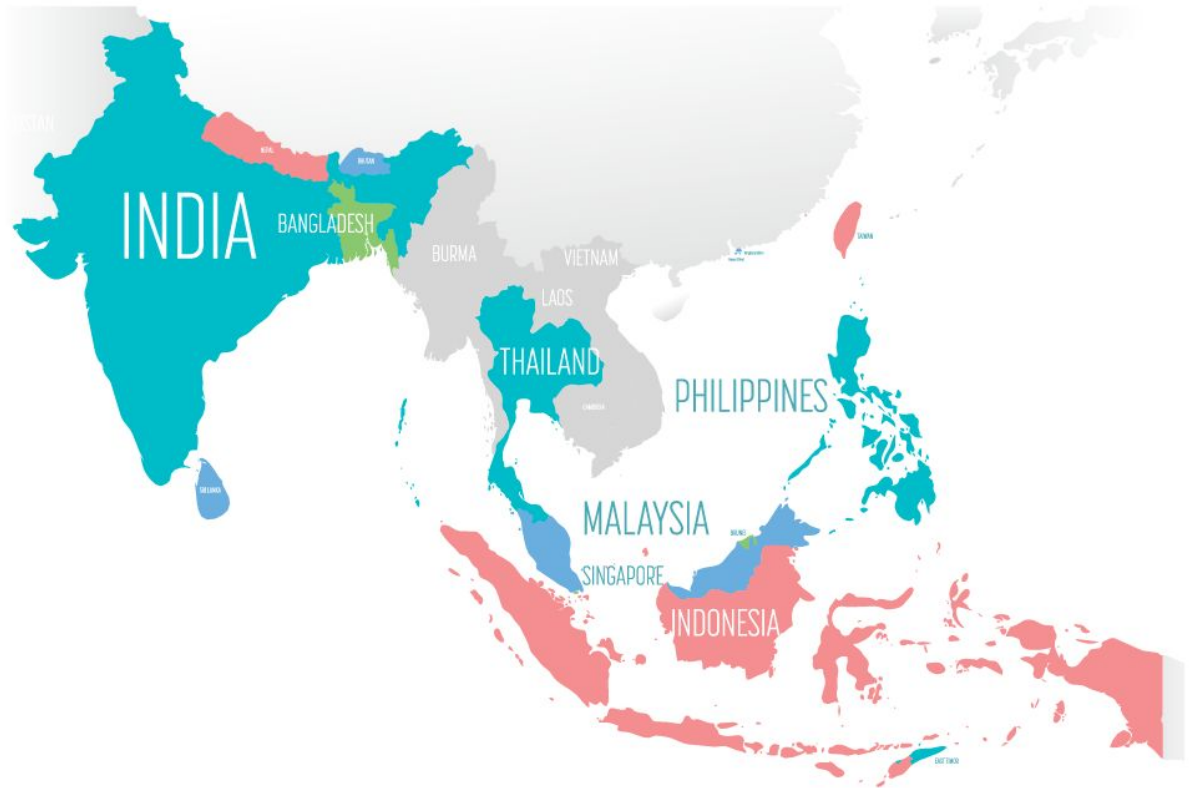
East Asia

- China
- Hong Kong
- Japan
- South Korea
- Taiwan



South-East Asia

- Bangladesh
- India
- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand



Australasia

- Australia
- New Zealand

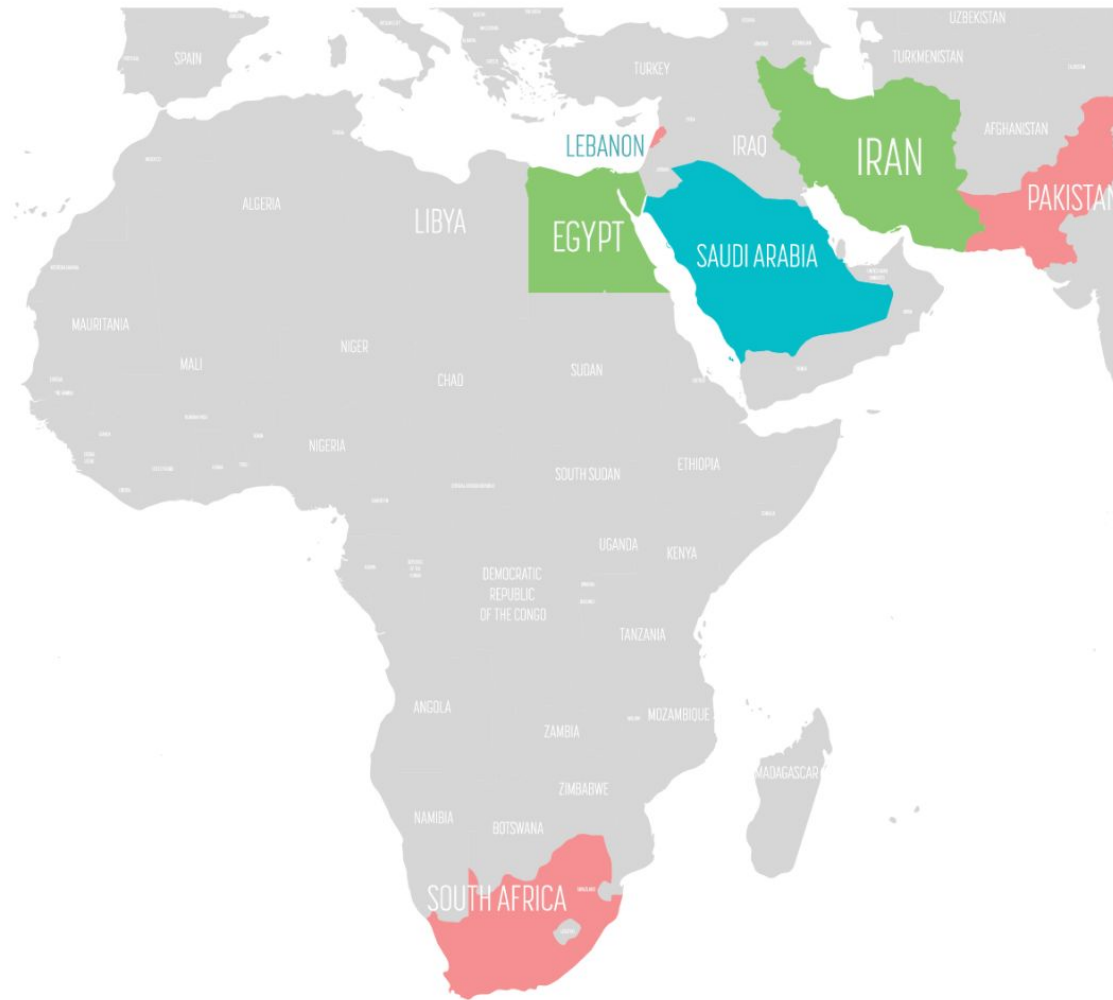


NEW ZEALAND



Middle-East and Africa

- Egypt
- Iran
- Lebanon
- Pakistan
- Saudi Arabia
- South Africa



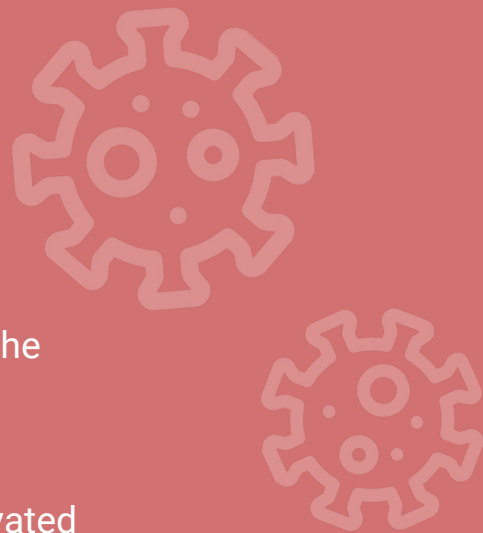
Before Covid Changed Trajectories

Covid-19 took the world by surprise in early 2020.

The lockdowns that almost universally followed had a global impact on the clinical research market among other industries.

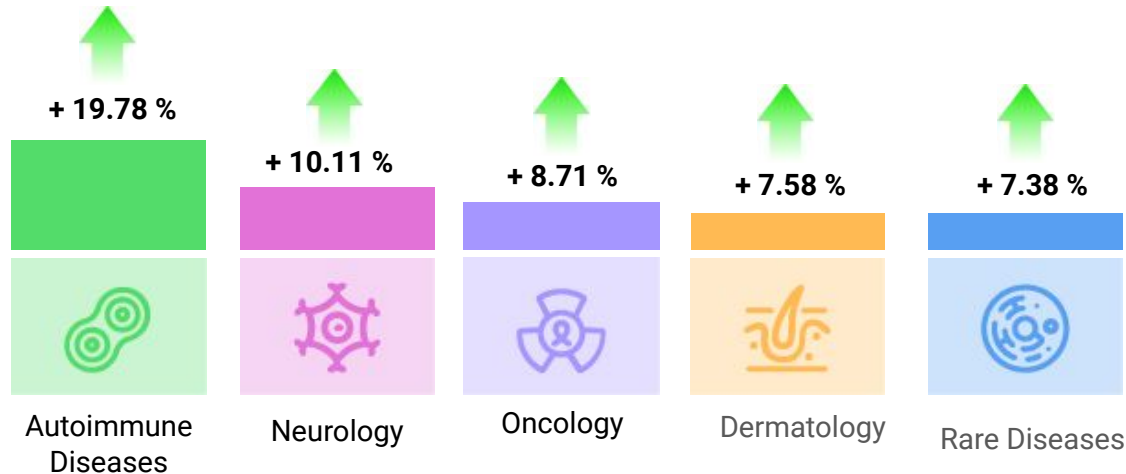
Though, according to a study we did last spring, patients remained motivated to participate in clinical trials, safety measures meant the industry had to slow down, transform and adapt - research could not go on as usual.

Many trials planned for 2020 had to be postponed. Digital transformation became an immediate priority. And therapeutic areas previously growing saw a drop. Let's take a look at the top 5 therapeutic areas (TAs) that were growing in a pre-Covid world (2018 and 2019).



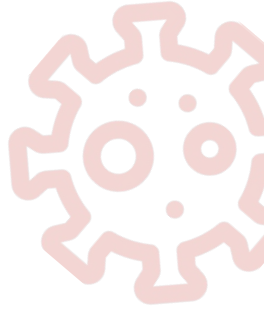
Top 5 TAs growing pre-Covid

2019 in general marked an increase in the sheer number of trials (50942) compared to 2018 (48651). These are the therapeutic areas that increased their number of trials with the highest percentage in 2019 compared to 2018.



Geographical areas emerging as research destinations pre-Covid

If we compared 2019 to 2018, there are 2 regions that marked a growth before Covid-19 changed trajectories.

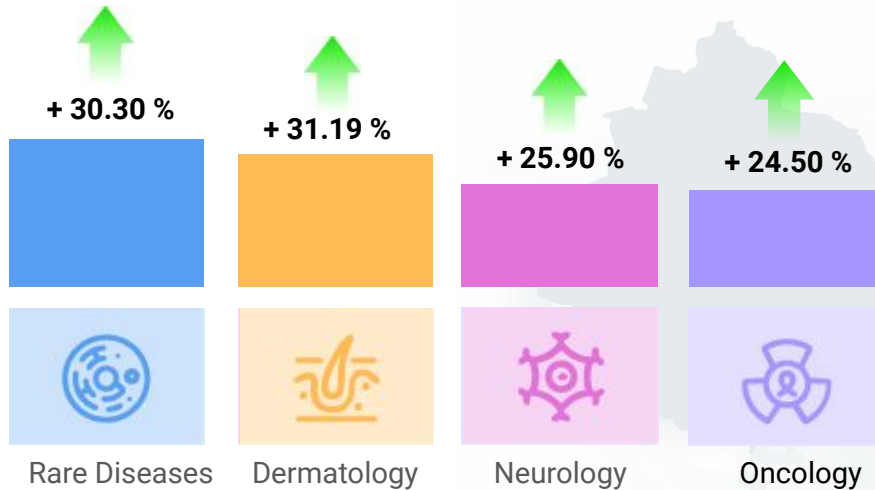


East Asia (China, Japan, South Korea, Hong Kong, Taiwan)

saw a **23.13%** increase in the number of trials.

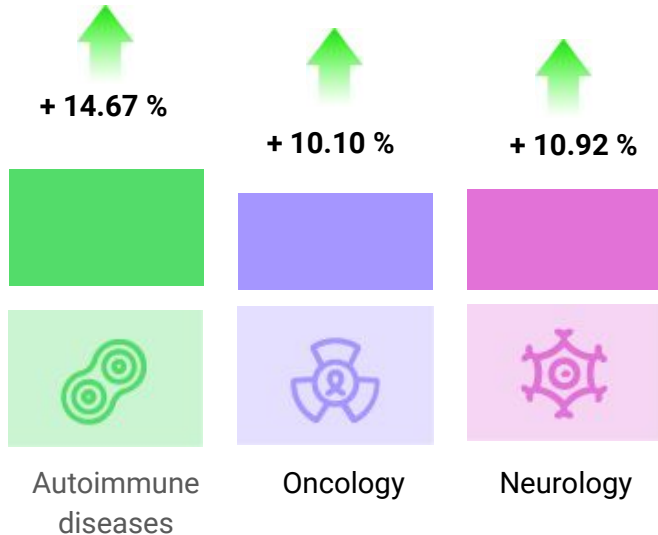
Top TAs growing in the region are:

Rare Diseases, Dermatology, Neurology, Oncology



Western Europe (Austria, Belgium, France, Germany, Ireland, Italy, Netherlands, Portugal, Spain, Switzerland, United Kingdom) saw a more moderate increase in the number of trials in 2019 compared to 2018 - **5.24%**.

Top TAs that were growing in the region are **Autoimmune diseases, Oncology, Neurology**.





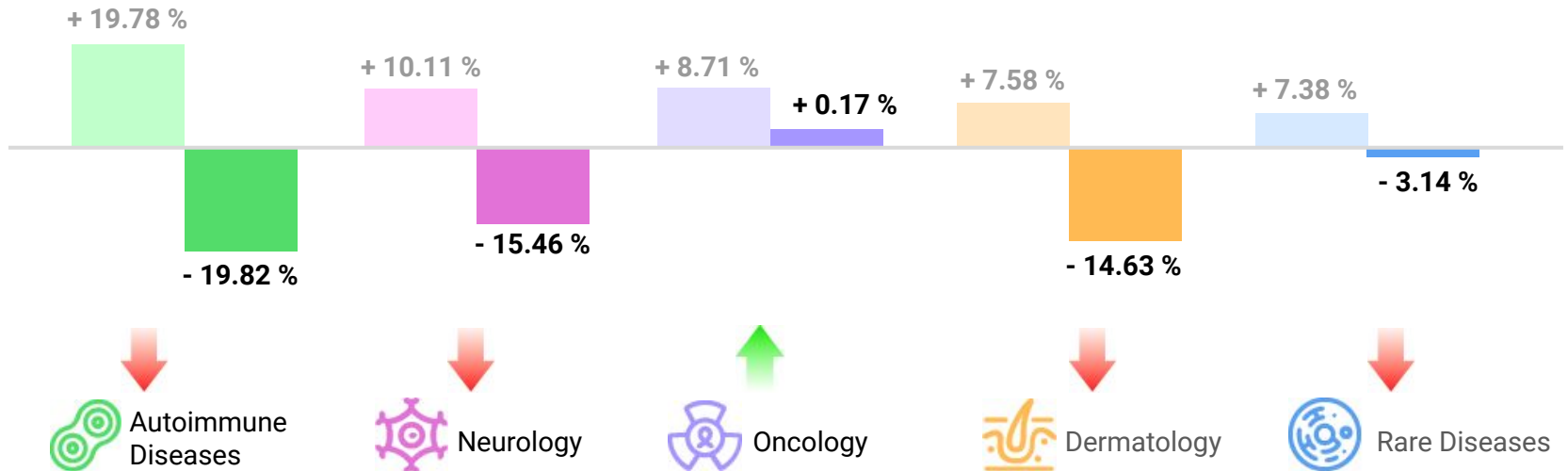
How Covid-19 Affected Therapeutic Areas

As we'll see in the next chapter, while Covid-19 had a more predictable impact on geographic regions (because of the way almost universal global lockdowns affected ongoing and planned trials), the therapeutic areas landscape was a bit more dynamic.

To begin with, let's take a look at how Covid-19 affected the top 5 TAs that were growing in 2019.



These percentages reflect the number of trials started in 2020 across phase 1, 2 and 3 compared to 2019



Top Therapeutic Areas growing in 2020

Despite the challenge it posed to ongoing and planned clinical trials in 2020, Covid-19 also contributed to a spike in the number of clinical trials in 2 TAs - Infectious and Respiratory diseases*.

The Infectious Diseases TA grew by **+167.96%**



Respiratory Diseases marks a growth of **+163.75%**



*According to MeSH, Covid-19 falls under both categories.

However, to gain a more realistic idea of what happened to those 2 TAs, we need to exclude Covid-19 clinical trials. If we do so, we're faced with a different perspective.

How are those 2 TAs doing when we remove Covid-19 trials?

Infectious Diseases saw a drop of **-15.63 %**



Respiratory Diseases - a drop of **-6.84 %**



When we remove Covid-19 from the total number of clinical trials, we can see that there are **2 TAs growing in 2020** despite the crisis.

Ophthalmology
+11.21%



Oncology
+0.17%

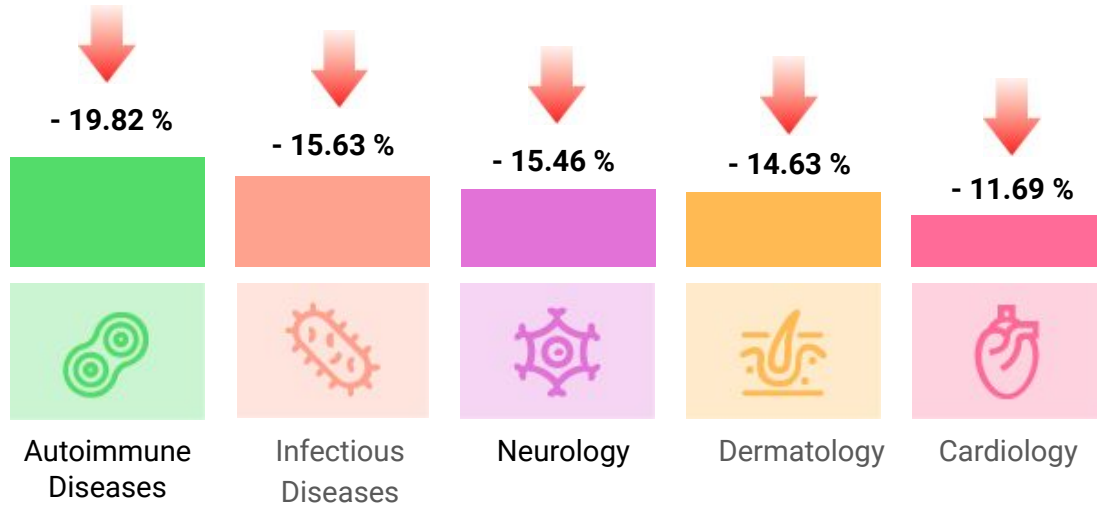


Top 5 Therapeutic Areas most affected by Covid-19

While in 2020 some TAs were growing on their own or due to Covid-19 research, others took a big hit. In fact, if we exclude Covid-19 trials from our calculations, it turns out that Infectious Diseases saw a big drop in the number of trials - **15.63%** compared to 2019.



These are the top 5 TAs that were negatively impacted in 2020



A drop in the sheer number of trials is one way to measure negative impact. Another way we can do so is by considering the number of trials that suffer delays. We estimated that out of **57304 currently recruiting studies** (in 2021), **30336 already postponed** their Primary Completion Date.

2021

57304 currently recruiting studies

2021

30336 already postponed



How Covid-19 affected geographical regions



It's difficult to get granular with trends affecting geographical regions, especially because of the difference in their size, population (including prevalence numbers) and market needs. What's more, the degree of severity of a region's Covid-19 cases and lockdown situation affected and continues to affect research in 2020 and the beginning of 2021.

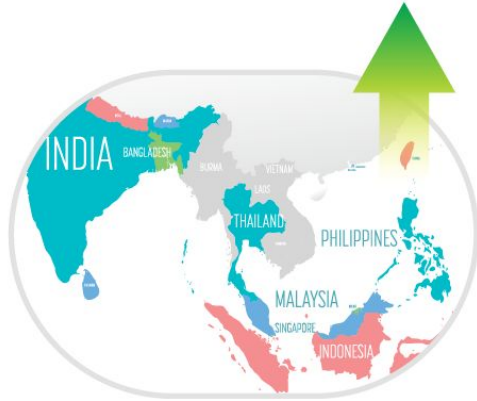
Here, we won't rank GRs (geographical regions) by top 5 but we'll rather talk about number of trials and general development.

Western Europe and East Asia

Western Europe and East Asia continued to grow in 2020. The percentages reflect the increase of started trials compared to the previous year.

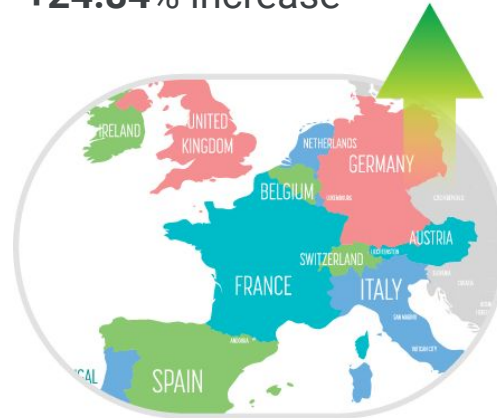
East Asia

+31.26% increase



Western Europe

+24.84% increase



Australasia (Australia and New Zealand)

The strict lockdowns in Australia and New Zealand kept the number of Covid-19 cases low, however, they didn't help the region grow its research.

Australasia

+ 6.13% increase



GRs least affected by Covid-19

While Covid-19 shook things up, to say the least, on a global scale, there are some regions that were less affected than others - research-wise. A breakdown by TAs is more appropriate here, and of course, we're comparing 2020 to the previous year.



South-East Asia

Autoimmune disease
growth **+25%**



+ 25 %

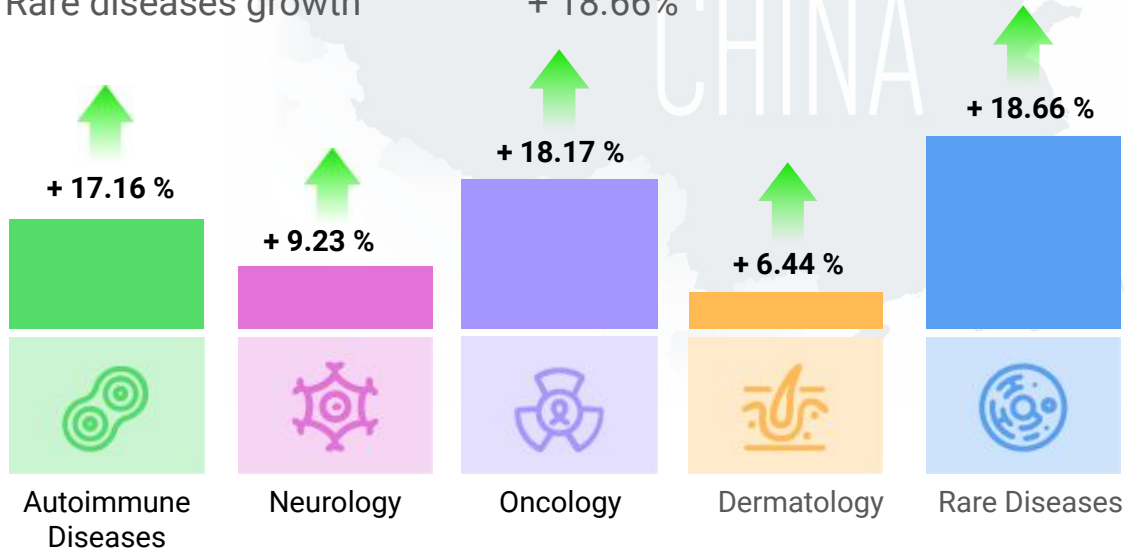


Autoimmune
Diseases



East Asia

Autoimmune diseases growth +17.16%
Neurology growth + 9.23%
Oncology growth + 18.17%
Dermatology growth + 6.44%
Rare diseases growth + 18.66%



Latin America

Autoimmune diseases
growth **+15.16 %**



+ 15.16 %



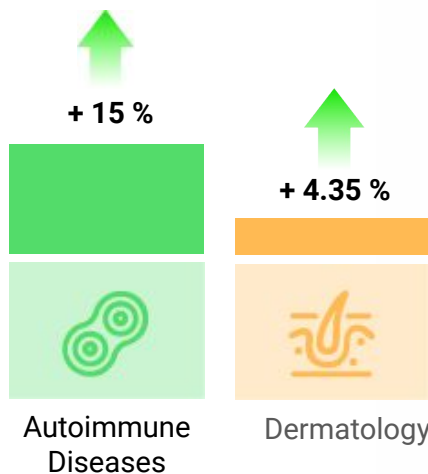
Autoimmune
Diseases



Scandinavia

Autoimmune diseases
growth +15 %

Dermatology
growth + 4.35%



Australasia

Oncology growth +11.79%

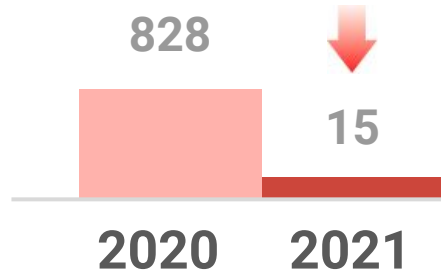


GRs still affected in Q1 of 2021

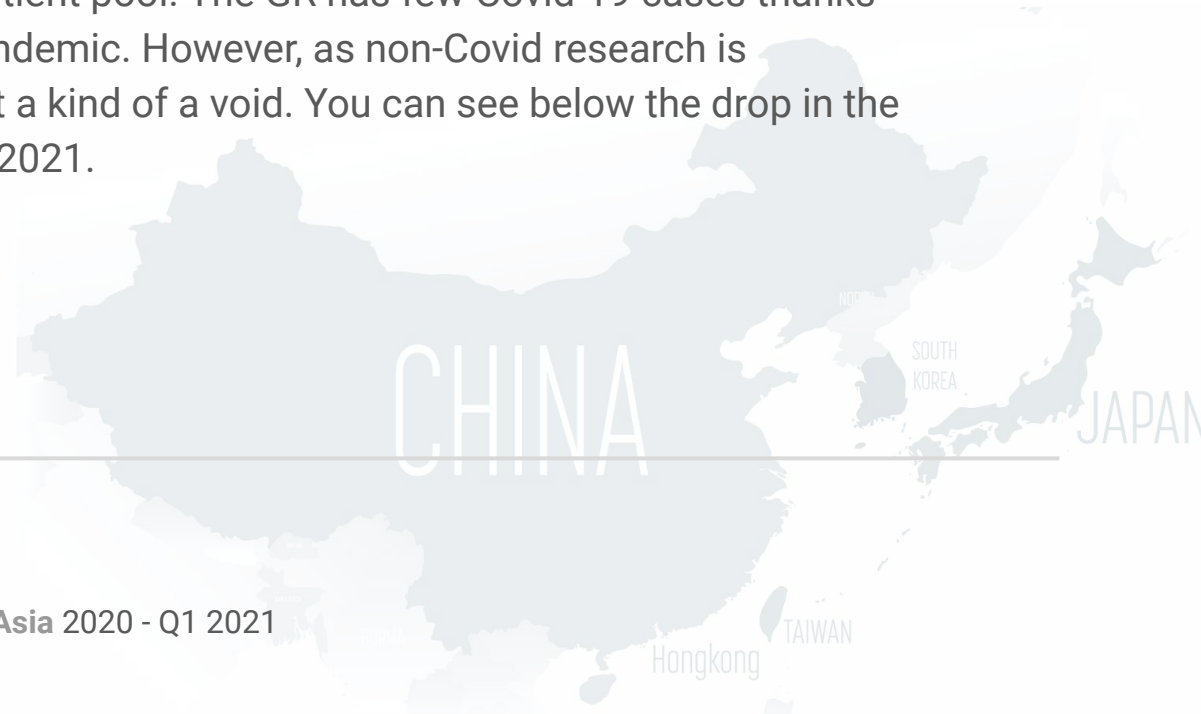
2021 is pivotal in terms of Geographical Regions distribution. On one hand, non-Covid research is resuming very slowly, on the other - some GRs have almost no new Covid-19 clinical trials due to various reasons, a small patient pool among them. This indicated a huge decline in the total number of clinical trials going on in Q1 of 2021 in those regions. Let's take a look those GRs individually.

East Asia

Covid-19 research dramatically dropped in the area **from 828 in 2020 to 15 in Q1 of 2021** due to a very small patient pool. The GR has few Covid-19 cases thanks to its early response to the pandemic. However, as non-Covid research is recovering very slowly, this left a kind of a void. You can see below the drop in the total number of trials in Q1 of 2021.



Covid-19 trials started in **East Asia** 2020 - Q1 2021



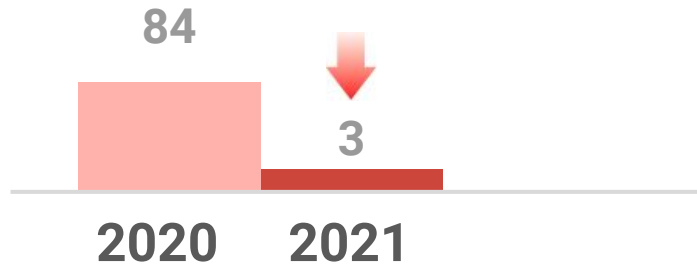
Drop in the total number of trials in Q1
2021

- **65.83%**



Australasia

Very similar to East Asia is the situation in Australasia. The restrictions put in place to fight the pandemic resulted in a very small patient pool when it comes to Covid-19 research and in turn - very few trials conducted there (**84 in 2020** and only **3 in Q1 of 2021**). On the other hand, non-Covid research is taking time to recover which creates a gap and a drop in the total number of trials started in the region.



Covid-19 trials started in **Australasia** 2020 - Q1 2021



Drop in the total number of trials in Q1
2021

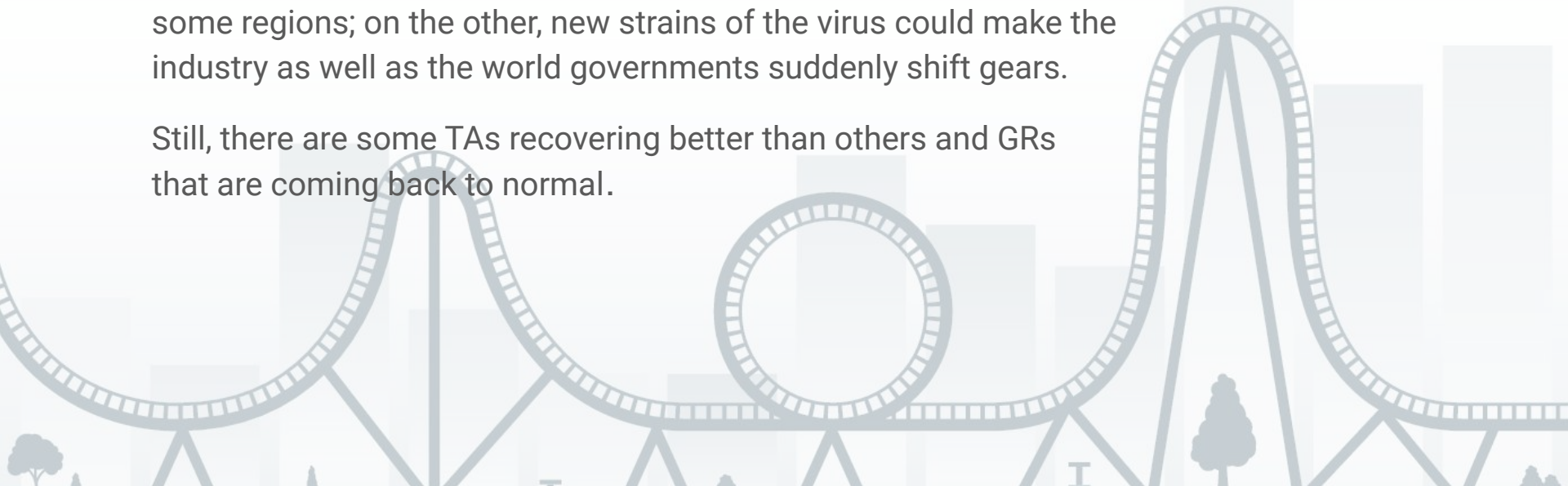
- **61.09%**



What does the future hold?

It's hard to make predictions in such a dynamic climate - on the one hand, the global pandemic that took us by surprise in 2020 seems more under control now and vaccination efforts are starting to yield results in some regions; on the other, new strains of the virus could make the industry as well as the world governments suddenly shift gears.

Still, there are some TAs recovering better than others and GRs that are coming back to normal.

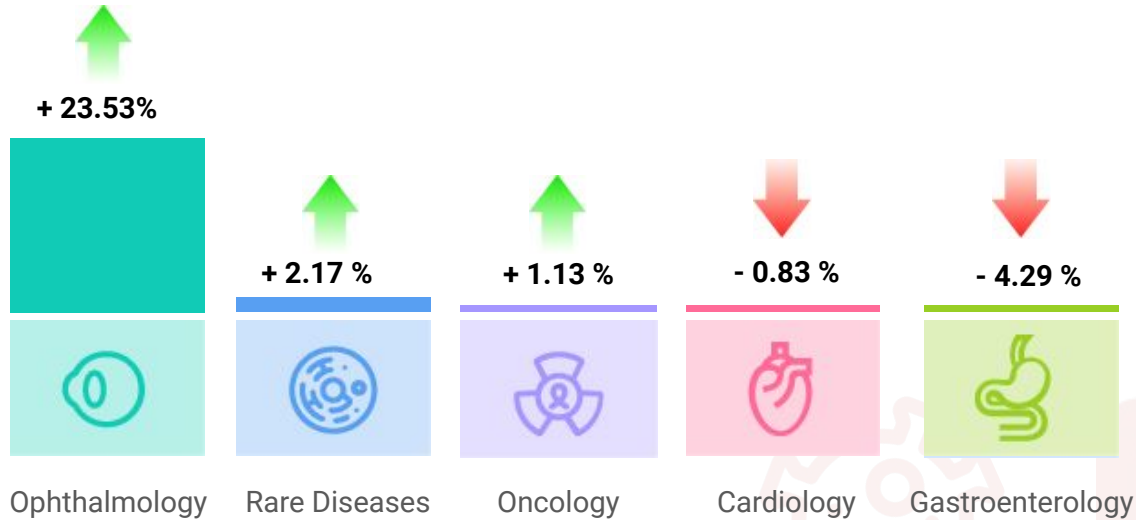


Top 5 TAs recovering from Covid-19

We assessed the top TAs recovering from Covid-19 by comparing the number of trials they had in Q1 of 2021 to the number of trials they had in Q1 of 2020 as Covid-19 was not yet a factor back then. Our hypothesis here is that this comparison could highlight TAs returning to normal (pre-Covid values) or even growing.



TAs recovering from Covid-19 compared to Q1 2020 (pre-Covid times)



The rest are yet to recover (catch up) compared to their pre-covid numbers.

Top 3 GRs recovering from Covid-19

A similar assessment took place when we compared geographical regions in 2021 to their 2020 numbers. There are 3 GRs doing better than others as non-Covid research is already recovering and Covid-19 research is still going strong. Though there are 2 GRs with negative growth compared to the previous year, the rest of the regions lost even bigger portion of their research.

GRs recovering from Covid-19 for Q1 2021 compared to 2020

North America
+0.50 % increase



Middle-East & Africa
- 20.26 % decrease



Scandinavia
-26.80% decrease



How Covid-19 affected the industry

Covid-19 had a huge impact both on GRs and on TAs slowing down certain research but also creating more opportunities in other areas. In 2020, research in East Asia grew with impressive speed during a pandemic. The region continued its development and increased research in Autoimmune diseases, Neurology, Oncology, Dermatology and Rare diseases.

However, in Q1 of 2021, East Asia along with Australasia saw a dramatic drop in the total number of trials. The common factor is the low number of Covid-19 cases in those regions which resulted in very few Covid-19 trials and the slow recovery of non-Covid research.



In terms of therapeutic areas, trends seem to be more stable. Some TAs like **Ophthalmology** saw a surprising growth in 2020 despite Covid-19 and continued to grow in Q1 of 2021. Others, like **Oncology** and **Rare diseases** were slowed down (Rare diseases more so than Oncology) but remained **an important piece** of the global research landscape. **Cardiology** and **Gastroenterology**, on the other hand, are recovering well but still not up to their pre-Covid numbers.

Most TAs, however, took a big hit in 2020 and are only now planning for recovery by resuming their paused or delayed trials.



About TrialHub and the data in this whitepaper

TrialHub is a feasibility intelligence platform that aggregates thousands of data sources in real-time and combines them with the insights of 100+ local experts.

The data provided in this white paper is gathered in April 2021 and is based on 17 clinical trial registries and analytics about thousands of clinical trials. **TrialHub** is a real-time data platform so the numbers are dynamic.

If you need help navigating the clinical research landscape post-Covid, you can turn to our team for support.





TrialHub

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