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Real World Evidence Solutions Market by Component (Services, Disparate Data Sets (Clinical), Application (Drug and Medical Device Development and Approvals), Mode of Deployment, Revenue Model, End Users, & Region, Business Model - Global Forecast to 2029

https://marketpublishers.com/r/REBE5557C2EEN.html
Date: February 2024
Pages: 412
Price: US$ 4,950.00 (Single User License)
ID: REBE5557C2EEN

Abstracts

The global Real-World Evidence Solutions market is projected to reach USD 4.5 Billion by 2029 from USD 2.0 billion in 2024, at a CAGR of 16.5% from 2024 to 2029. The growth of the market is fuelled by an upsurging shift from volume to value-based care and rise in geriatric population. Real-world evidence (RWE) holds the potential of cutting down both costs and time in the drug development process. This has resulted in a growing adoption of RWE within numerous pharmaceutical and medical device companies, leading to drive the market growth throughout the forecast period. But scarcity of skilled personnel, and absence of universally acknowledged standards or principles governing the design, execution, analysis, and reporting of Real-World Evidence (RWE) poses a significant challenge within this market.

“Real-World Evidence Solution, services segment to witness the highest growth during the forecast period.”

Based on component, the Real-World Evidence Solution market is segmented into Real-World Evidence Solution services and Real-World Evidence Solution data sets. In 2023, service segment is projected to grow at the highest CAGR during the forecast period. The service segment encompasses advanced analytic services and consulting services. These services play a crucial role in extracting meaningful patterns of information, enabling clinicians to make informed treatment decisions. Additionally, they help end

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users in conducting multifunctional workshops for the development of Real-World Evidence (RWE) and operational plans. Furthermore, experts in Real-World Evidence (RWE) actively communicate and collaborate with subject matter experts from pharmaceutical and medical devices companies. This collaboration aims to provide services that contribute to the formulation of intelligent strategies, ultimately driving growth the services segment throughout the forecast period.

“Drug and Development and approval segment to register the highest growth in the Real-World Evidence Solution market during the forecast period.”

Based on application, the Real-World Evidence Solution market is segmented into drug development and approvals, medical device development and approvals, post market surveillance, market access and reimbursement/coverage decision making, Clinical & regulatory decision making. The drug development and approval segment dominate the market by application. The drug development and approvals market are further bifurcated into oncology, neurology, cardiovascular diseases, immunology, and other therapeutic areas. The oncology segment holds the largest position in drug development and approval segment. This is attributed to the increasing number of clinical trials conducted on cancer drugs, and upsurging number of cancer patients across the globe drives the segmental growth. As per World Health Organization (WHO), the implementation of evidence-based prevention strategies and the avoidance of risk factors have the potential to prevent approximately 30 to 50% of cancers.

“Pharmaceutical and medical device companies’ segment to register the highest growth in the Real-World Evidence Solution market during the forecast period.”

Based on end user, the RWE solution market is segmented into pharmaceutical and medical devices companies, healthcare payers, healthcare providers, and other end-users which includes CROs, academic institutions, patient advocacy groups, and HTA agencies. In 2023 the pharmaceutical and medical device companies hold the largest share among the end users. This is due to many companies are adapting the RWE solutions to decrease the cost and time for the drug development process, as RWE data helps new drugs and new medical devices to successfully pass through the clinical trials phases.

“APAC is estimated to register the highest CAGR during the forecast period.”

In this report, the Real-World Evidence Solution market is segmented into five major regional segments, namely, North America, Europe, Asia Pacific, Latin America and

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Middle East and Africa. The RWE solution market in APAC is projected to register the highest CAGR rate during the forecast period. The growth of this region is due to rise in government initiatives towards the adoption of RWE by the pharmaceutical and medical device companies. Moreover, the clinical trials in this region are very cost-effective thus increasing the number of clinical trials being conducted in this region. For instance, according to the NOVOTECH report published in May 2022, on the Evolution of Clinical Trials in the Asia Pacific Region in comparison to the US and the EU5, a total of over 70,000 new clinical trials were recorded across the APAC region, the US, and the EU5 during the analysis period from 2017 to 2021. Notably, the APAC region emerged as the primary contributor, accounting for over 50% of the trials, followed by the US with 29%, and the EU5 with 17%.

Breakdown of supply-side primary interviews, by company type, designation, and region:

By Company Type: Tier 1 (40%), Tier 2 (35%), and Tier 3 (25%)

By Designation: C-level (35%), Director-level (45%), and Others (20%)

By Region: North America (55%), Europe (20%), Asia Pacific (15%), Latin America (5%) and Middle East Africa (5%)

List of Companies Profiled in the Report

IQVIA HOLDINGS INC. (North Carolina)

Merative (Ann Arbor, MI)

Optum Inc. (Eden Prairie)

Icon Plc. (Dublin)

Syneos Health (North Carolina),

Parexel International Corporation (North Carolina)

Thermo Fisher Scientific Inc. (North Carolina)

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LABORATORY CORPORATION OF AMERICA HOLDINGS (Burlington, North Carolina)

Oracle (California)

ELEVANCE HEALTH, INC. (Indiana)

SAS Institute Inc. (North Carolina)

Aetion Inc. (New York)

Trinetx Llc. (Cambridge, MA)

Trinity (Waltham)

PerkinElmer, Inc. (Shelton, CT)

COGNIZANT TECHNOLOGY SOLUTIONS CORPORATION (New Jersey)

Clinigen Group plc (London)

Cegedim Health Data (Boulogne-Billancourt)

Verantos (California)

Medspace Holdings Inc. (Ohio)

HealthVerity, Inc. (Philadelphia)

Datavant (San Francisco, CA)

Syapse, Inc. (San Francisco, CA)

Tempus (Chicago, IL)

Flatiron Health (New York)

Research Coverage

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This report studies the Real-World Evidence Solution market based on components, application, end user, and region. The report also analyses factors (such as drivers, opportunities and challenges) affecting market growth. It evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders. The report also studies micro markets with respect to their growth trends, prospects, and contributions to the total Real-World Evidence Solution market. The report forecasts the revenue of the market segments with respect to five major regions.

Reasons to Buy the Report

This report also includes.

Analysis of key drivers (Increasing geriatric population and rise in incidences of chronic diseases, upsurging shift from volume to value-based care, and the increase in number of pharmaceutical and biopharmaceutical companies adapting the RWE), challenges (scarcity of skilled personnel, and the lack of universally accepted methodology principles and data processing infrastructure), opportunities (the rise in focus on end-to-end RWE services, and increase in emerging markets) contributing the growth of the Real-World Evidence Solution market.

Product Development/Innovation: Detailed insights on upcoming trends, research & development activities, and new software launches in the Real-World Evidence Solution market.

Market Development: Comprehensive information on the lucrative emerging markets, components, application, end-user, and region.

Market Diversification: Exhaustive information about the software portfolios, growing geographies, recent developments, investments in the Real-World Evidence Solution market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, company evaluation quadrant, and capabilities of leading players in the global real-world evidence solution Market.

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