

Decentralized Clinical Trials Market / Virtual Clinical Trials Market (2nd Edition): Distribution by Mode of Clinical Trial (Hybrid Clinical Trial and Fully Virtual Clinical Trial), Type of Therapeutic Area (Cardiovascular Disorders, Infectious Diseases, Metabolic Disorders, Neurological Disorders, Oncological Disorders, Respiratory Disorders and Other Disorders), Clinical Trial Phase (Phase I, Phase II, Phase III and Phase IV), Company Size (Small, Mid-sized and Large), End Users (Pharmaceutical and Biotechnology Companies, Academic and Research Institutes, Medical Device Industries and Other End Users) and Key Geographical Regions (North America, Europe, Asia-Pacific, Middle East and North Africa, and Latin America): Industry Trends and Global Forecasts, 2023-2035

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Abstracts

The global virtual clinical trials market is expected to reach USD 13.92 billion in 2023 anticipated to grow at a CAGR of 10% during the forecast period 2023-2035.

The development of a new molecular entity for pharmaceutical use involves a complex and financially demanding process, typically requiring over 10 years and an investment

exceeding USD 2.5 billion for a prescription therapeutic to transition from laboratory development to market availability. A considerable portion of the overall research and development (R&D) budget, around 40% in the United States, is allocated to clinical research. Despite substantial investment, persistent challenges include difficulties in recruiting patients, inefficiencies in managing clinical data, and the risk of unforeseen delays or failures due to safety concerns and unexpected drug side effects during evaluation.

Clinical trials commonly encounter delays, with over 90% experiencing setbacks attributed to challenges in enrolling or retaining the required number of participants. Inconsistent and inefficient recording and maintenance of electronic health records contribute to issues in handling clinical data. The emergence of the COVID-19 pandemic in 2020 further disrupted clinical research, diverting medical resources and causing significant halts in ongoing studies. Although clinical trials have gradually resumed post-pandemic, adherence to new operational norms remains crucial.

To tackle these challenges, the concept of virtual clinical trials, also known as decentralized clinical trials, has emerged as a significant advancement in the pharmaceutical industry. Collaboration between drug developers and virtual clinical trial companies enables the use of platforms that support decentralized trials, offering solutions to critical concerns in trial conduct and facilitating research continuity, even during pandemics. Various virtual Contract Research Organizations (CROs) currently offer diverse services and solutions for managing different aspects of clinical trials. Focusing on patient-centric approaches, expanding trial outreach, and reducing investigator workloads, these advancements are driving the growth of services related to decentralized clinical trials, extending beyond pandemic scenarios.

Essential components for decentralized clinical trials include dedicated software applications, tools for remote patient monitoring, and web-based social engagement platforms. Experts suggest potential cost savings of up to 25% of the total trial investment through the utilization of such solutions. Notably, investor interest in this field has surged, with private and public investments surpassing USD 9 billion since 2021. With ongoing innovation, increased investor engagement, and a growing number of decentralized clinical trials since 2018, the decentralized clinical trials market is poised for significant growth in the foreseeable future.

Report Coverage

The report conducts an examination of the virtual clinical trials market, analyzing

aspects such as the mode of clinical trial, therapeutic area type, clinical trial phase, company size, end users, and key geographical regions.

Factors influencing market growth, including drivers, restraints, opportunities, and challenges, are thoroughly analyzed in the report.

An assessment of potential advantages and obstacles within the market is provided, along with insights into the competitive landscape for leading market players.

Revenue forecasts for market segments are projected across five major regions.

A meticulous and systematic research methodology was employed, encompassing various assumptions, methodological approaches, and stringent quality control measures to ensure the accuracy and reliability of findings regarding decentralized clinical trials/virtual clinical trials.

Economic factors affecting the decentralized clinical trials/virtual clinical trials market, including historical trends, currency fluctuations, foreign exchange impacts, recession and inflation measurements, are comprehensively analyzed for their influence on market dynamics.

The executive summary encapsulates key research insights, offering a high-level perspective on the current state of the decentralized clinical trials/virtual clinical trials market and outlining its anticipated evolution in the medium to long term.

A comprehensive overview comparing decentralized clinical trials with traditional ones highlights the necessity for decentralized trials, covering various modes and applications, upcoming trends, and associated challenges shaping the future of this field.

Detailed insights into the current market landscape of companies engaged in virtual clinical trials/decentralized clinical trials are provided, encompassing establishment information, company size, headquarters, key offerings, compliance, trial modes, capabilities, therapeutic areas, and trial phases.

Elaborate profiles of companies offering services for decentralized clinical trials/virtual clinical trials are furnished, detailing establishment year,

headquarters, company size, key executives, offerings, financial information, recent developments, and future outlook.

A meticulous competitiveness analysis of service providers in decentralized clinical trials/virtual clinical trials evaluates parameters such as company strength, service offerings, and therapeutic area diversity.

Analysis of completed/ongoing decentralized clinical trials/virtual clinical trials covers various parameters like trial registration year, patient enrollment, phases, statuses, patient demographics, therapeutic areas, sponsors, emerging focus areas, designs, interventions, active players, and geographical distribution.

Partnerships and collaborations in the decentralized clinical trials/virtual clinical trials market between 2018-2023 are thoroughly examined, considering partnership types, capabilities, active players, and geographical aspects.

An evaluation of funding and investments in the decentralized clinical trials/virtual clinical trials market from 2018-2023 is presented, detailing funding trends, types, geographical analysis, leading players, and investors.

Case studies highlight initiatives by major pharmaceutical companies in decentralized clinical trials/virtual clinical trials, outlining conducted/planned studies, associated constraints, and future plans in this industry.

Differences between traditional and decentralized contract research organizations are detailed, accompanied by a roadmap for transitioning a traditional CRO to a decentralized/virtual CRO business model.

A case study examining the impact of the COVID pandemic on companies engaged in decentralized clinical trials/virtual clinical trials is presented.

Cost-saving potential analysis for decentralized clinical trials/virtual clinical trials until 2035 is outlined, highlighting potential savings across different trial phases and geographical regions.

An in-depth analysis identifies drivers, restraints, opportunities, and challenges impacting the growth of the decentralized clinical trials/virtual clinical trials market.

Key Market Companies

Aardex

Cambridge Cognition

CareShare

Clariness

Cliniv

Clinscience

CMIC

DynamiQ Health

Emovis

Ergomed

Flatworld Solutions

Fortrea

Gsap

Guild

Hexaware Technologies

Huma

ICON

IQVIA

Kayentis

KORE Wireless

Labcorp

Medidata Solutions

Medpace

PanAmerican Clinical Research

Parexel

PPD (a Thermo Fisher Company)

Science 37

Signant Health

Syneos Health

Tata Consultancy Services

Veeva

Viedoc

WeGuide

Wren Healthcare

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26. APPENDIX 1: TABULATED DATA

27. APPENDIX 2: LIST OF COMPANIES AND ORGANIZATIONS

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