

North America Health Economics and Outcome Research (HEOR) Services Market Size and Forecast (2021-2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Service (Economic Modelling or Evaluation, Real World Data Analysis and Information System, Market Access Solutions and Reimbursement, Clinical Outcome, Other Services), Service Provider (Contract Research Organizations and Consultancy), and End User (Biotechnology and Pharmaceutical Companies, Healthcare Payers, Government Organizations, and Healthcare Providers)

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Abstracts

The North America health economics and outcome research (HEOR) services market is projected to grow significantly, reaching an estimated US\$ 1,801.16 million by 2031, up from US\$ 783.61 million in 2024. This growth represents a compound annual growth rate (CAGR) of 12.6% from 2024 to 2031.

Executive Summary and Market Analysis

The HEOR services market in North America is primarily divided into three regions: the United States, Canada, and Mexico. The United States dominates the market, holding the largest share, followed by Canada. The growth of the HEOR services market in North America is driven by several factors, including an increasing demand for HEOR

services from healthcare stakeholders, government initiatives aimed at promoting cost-effective healthcare solutions, and strategic advancements by HEOR service providers to enhance their offerings. Additionally, the expanding healthcare industry is increasingly relying on frameworks and guidelines based on real-world data to inform their business models.

Strategic Insights

Market Segmentation Analysis

The North America HEOR services market can be segmented based on service type, service provider, and end user.

- 1. Service Type:** The market is categorized into several services, including economic modeling or evaluation, real-world data analysis and information systems, market access solutions and reimbursement, clinical outcomes, and others. Among these, the economic modeling or evaluation segment is expected to hold the largest market share in 2024.
- 2. Service Provider:** The market is divided into contract research organizations (CROs) and consultancy firms. In 2024, the CRO segment is anticipated to dominate the market due to its extensive capabilities in conducting research and providing HEOR services.
- 3. End User:** The end users of HEOR services include biotechnology and pharmaceutical companies, healthcare payers, government organizations, and healthcare providers. The biotechnology and pharmaceutical companies segment is projected to hold the largest share in 2024, reflecting the high demand for HEOR services in drug development and market access strategies.

Market Outlook

The healthcare sector has undergone significant transformation with the integration of information technology, artificial intelligence, and digital innovations. This digitalization has attracted major technology companies, such as Apple, Amazon, Alphabet, and Microsoft, to venture into healthcare. For example, Alphabet's Google is actively involved in life sciences and healthcare investments, leveraging its technological expertise to develop wearable devices, digital applications, and diagnostic technologies that monitor health and fitness.

The advancements in electronic medical records, telemedicine, and big data analytics are some of the key outcomes of healthcare digitalization. Microsoft, for instance, is exploring the potential of artificial intelligence to revolutionize healthcare, genomics, telehealth, cloud computing, and cybersecurity.

Continuous innovations by core healthcare companies are propelling the growth of the HEOR services market. A notable development occurred in October 2023 when Curavit Clinical Research, a virtual contract research organization specializing in decentralized clinical trials for digital therapeutics, launched a new Health Economics and Outcomes Research Practice. This initiative aims to integrate HEOR services into clinical trials to gather evidence on the health economic value of new pharmaceutical products, particularly in the realm of digital therapeutics. Curavit's efforts will also focus on evaluating the impact and effectiveness of digital therapeutic interventions on both individual and population health levels.

Country Insights

The North America HEOR services market is composed of the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The US is expected to maintain its leading position due to the presence of numerous HEOR service providers, a robust healthcare industry that offers a wide range of opportunities for HEOR services, and a growing trend towards well-structured business models among companies.

Increased investments in research and development by both the US government and private sector players are further fueling the HEOR services market. According to the National Center for Science and Engineering Statistics (NCSES), businesses contributed approximately US\$ 130 billion to research in 2021, accounting for 49% of total research spending in the US and 22% of all corporate funding for research and development. Notably, 77% of all US research and development in 2021 was conducted by businesses, totaling US\$ 609 billion.

Company Profiles

Key players in the North America HEOR services market include PharmaLex GmbH, ICON Plc, IQVIA Holdings Inc, Syneos Health Inc, Optum Inc, Certara Inc., ExlService Holdings, Inc., Avalon Health Economics LLC, Axtria, Inc., and McKesson Corp, among others. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase their

market share in the HEOR services sector.

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