eClinical Solutions Market by Product (CDMS, EDC, CTMS, eCOA, Analytics, RTMS, eTMF, Safety), Delivery Mode (On-Demand, On-premise, Cloud-based), Clinical Trial Phases, End User (Pharma/Biopharma Companies, CROs, Hospitals) - Global Forecast to 2022

Description: The global eClinical solutions market is estimated to reach 7.61 billion by 2022, at a high CAGR of 12.4% in the forecast period (2017-2022). The growth of the global eClinical solutions market is driven by factors such as a need for improved data standardization and an increase in R&D expenditure by pharma-biotech companies with significant IT budgets for drug development. In addition, the rising number of clinical trials, especially across emerging countries in the Asia-Pacific region, offers growth opportunities for vendors of eClinical solutions. However, a dearth of skilled research professionals and concerns over patient data privacy are hampering the adoption of these solutions.

On the basis of clinical trial phases, the global eClinical solutions market is divided into phase I, phase II, phase III, and phase IV. The phase III clinical trials segment accounted for the largest share of the global eClinical solutions market in 2016. In addition, the phase III clinical trials segment is expected to grow at the highest CAGR during the forecast period.

Geographically, North America commanded the largest share of the global eClinical solutions market in 2016, followed by Europe. The large market share of North America is attributed to the significant number of ongoing clinical trials in this region. A number of factors such as the increasing government grants to support clinical trials, continuous product development and launch by eClinical solution vendors, growth in the number of partnerships for new drug development, high prevalence of lifestyle diseases, and an increasing aging population are further stimulating the demand for eClinical solutions in North America. However, strict and lengthy government requirements and high cost of conducting trials are negatively affecting the growth of the market in this region.

Although developed regions such as North America and Europe held large shares in the eClinical solutions market in 2016, it is the Asia-Pacific region that is poised to achieve the highest CAGR in the next five years. Factors such as the increasing outsourcing of clinical trial studies by large pharma and biopharma companies to Asia-Pacific countries, the presence of large patient population, and the low operating cost of conducting clinical trials are propelling the growth of the eClinical solutions market in this region.

The eClinical solutions market is highly competitive, with a large number of global and local players. Oracle Corporation (U.S.) Medidata Solutions, Inc. (U.S.), and PAREXEL International Corporation (U.S.) were the top three players in the eClinical solutions market in 2016. Partnerships, agreements, and collaborations; product launches, enhancements, and deployments; mergers and acquisitions; and geographic expansions are the major strategies adopted by most players to achieve growth in the eClinical solutions market.

Research Coverage

The report covers software solutions used across all phases in the clinical trial process. It aims at estimating the market size and future growth potential of this market across different segments such as product type, delivery mode, clinical trial phase, end user, and regions. The report also includes an in-depth competitive analysis of the key players with their company profiles, recent developments, and key market strategies.

Reasons to Buy the Report

This report focuses on various levels of analysis-market share analysis of the top players and company profiles, which discuss basic views on the competitive landscape; emerging and high-growth segments of the eClinical solutions market; and high-growth regions and their respective drivers, restraints, challenges, and opportunities.

The report will enrich both established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, will help them garner greater market shares. Companies purchasing the report could use any one of the combination of the strategies mentioned below, namely, market penetration, product
development/innovation, market development, market diversification, and competitive assessment to strengthen their market shares.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on eClinical solutions offered by the top 10 players in the market. The report analyzes the eClinical solutions market, by product, delivery mode, clinical trial phase, and end users across four geographies.
- Product Development/Innovation: Detailed insights on current technologies, research and development activities, and product launches in the eClinical solutions market.
- Competitive Assessment: Assessment of market shares, strategies, products, distribution networks, and manufacturing capabilities of the leading players in the eClinical solutions market.
5.2.2.1 High Implementation Costs Associated With Eclinical Solutions
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