Everest Group®

Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2025

September 2025

PEAK MATRIX®

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Introduction and overview

Research methodology

Key information on the report

Introduction

Scope of the evaluation

Market trends

Provider landscape analysis

Key buyer considerations

Key takeaways for buyers

Summary of key messages

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01 Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02 Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests

04 Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

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Proprietary contractual database of over 680 life sciences technology contracts (updated annually)

Year-round tracking of 50+ clinical development technology providers

Large repository of existing research in clinical development technology

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

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This report is based on key sources of proprietary information

- Proprietary contract-based database, which tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including provider, contract type, TCV and ACV, provider FTEs, start and end dates, duration, and delivery locations
  - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary provider database, which tracks the following elements of each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by line of business
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed
- Provider briefings
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment
- Buyer reference interviews, ongoing buyer surveys, and interactions
  - Drivers of and challenges to adopting services
  - Assessment of provider performance
  - Emerging priorities
  - Lessons learned and best practices

Providers assessed[1]

AliraHealth Patient-Enabled Solutions™, castor, CLARIO., Clinical ink, crucial DATA SOLUTIONS, Datacubed Health, DELVE HEALTH, IQVIA, Jeeva CLINICAL TRIALS, Medable, MEDIDATA, merative, ObvioHealth, SIGNANT HEALTH, THREAD®, Veeva, viedoc™, umotif, YPrime

1 Assessments for Clinical ink, ObvioHealth, Signant Health, and Veeva Systems excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
The source of all content is Everest Group unless otherwise specified
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will be presented only in an aggregated fashion

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Introduction

Electronic Clinical Outcome Assessment (eCOA) platforms are becoming increasingly integral to clinical trials, enabling the digital collection of patient, clinician, and caregiver-reported outcomes. These platforms support better data accuracy, timely insights, and greater operational efficiency, all of which are important as the industry moves toward more decentralized and patient-centric trial models.

Previously, outcome assessments were often managed through paper-based methods, which could be time-consuming and difficult to scale. Over time, eCOA solutions have evolved from being basic electronic tools to more advanced platforms that support various modes of data capture, including smartphones, tablets, web portals, and provisioned devices. They also offer features such as real-time data updates, integration with other clinical systems, and tools to improve participant compliance and trial visibility.

Sponsors and Contract Research Organizations (CROs) are increasingly seeking platforms that offer flexibility and scalability depending on study complexity, therapeutic area, and geographic reach.

Providers are also investing in novel data capture modalities such as voice- and image-based inputs, while continuing to improve usability and accessibility to boost compliance and reduce participant burden.

This report includes the profiles of the following 19 leading eCOA product providers featured on the eCOA PEAK Matrix:

- **Leaders:** Clario, YPrime, Medable, Medidata Solutions, Signant Health
- **Major Contenders:** Alira Health, Castor, Clinical ink, Datacubed Health, IQVIA, Merative, THREAD, uMotif, Veeva Systems, Viedoc Technologies
- **Aspirants:** Crucial Data Solutions, Delve Health, ObvioHealth, Jeeva Clinical Trials

Scope of this report

Geography: global

Industry: life sciences

Product: Electronic Clinical Outcome Assessment (eCOA)

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Everest Group scope of the eCOA Product PEAK Matrix Assessment

[NOT EXHAUSTIVE]

Scope of assessment

eCOA product features

Sponsor-/site-facing features	Patient-facing features	Broader platform features
Survey and form builder with flexible logic and field validation; pre-validated template library	eDiaries, questionnaires for qualitative/ quantitative data capture; daily task lists	Web/mobile-based offering; BYOD
Survey scheduler based on time- or action-triggers	Trial performance summaries to patients	Single sign-on, multiple login options
Guided checklist for site staff during patient visit	Appointment scheduling and eVisits with physicians; chat functionalities with physicians	Multi-lingual support
Reminders and notifications	Reminders and notifications	Integration with wearables/sensors, EDC, CTMS IRT, eConsent, etc.
Study progress tracking with real-time reporting and predictive analytics	Voice and image capture	Data management and reporting
Appointment scheduling and eVisits with patients	Gamified functionalities (for patient engagement)	Backup and recovery
Automated audit trails and metadata management		Regulatory compliance

eCOA services

Study design consulting and COA selection expertise	Implementation support	Validation support	Logistics support	Translation and scale management	Training and support

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Market trends

The rising demand for real-time, patient-centric insights and low-code tools fuels eCOA market momentum

Market size and growth

- The eCOA product market is currently valued at ~ US$800 million and is projected to grow at a Year-over-Year (YoY) rate of 8–10%, reaching approximately US$950 million by 2027
- eCOA deals can vary significantly based on trial complexity. A complex eCOA deployment can have more than US$1 million as TCV, whereas eCOA software for simpler studies can be priced around US$200-400k

Key drivers

Demand for real-time patient data	Sponsors and sites increasingly require immediate access to patient-reported outcomes to monitor safety, track efficacy trends, and make timely adjustments, driving a broad adoption of eCOA.
Improved patient engagement	Intuitive, adaptable interfaces motivate patients to consistently report outcomes, boosting engagement and driving higher compliance.
Increased data quality and accuracy	eCOA solutions replace error-prone paper methods, eliminating missing entries and inconsistencies by using built-in validation checks and real-time prompts to ensure accurate, complete data capture.
AI-driven automation	Leveraging AI to identify trends and anomalies in patient data and automating complex research tasks helps in reducing manual effort and in compressing study timelines.

Opportunities and challenges

Low-code/No-code functionality	This presents a key opportunity as visual, drag-and-drop configuration tools let study teams customize eCOA workflows, expedite deployment, and reduce the time to launch.
Seamless wearable and system integration	It offers robust connectivity with wearable devices and ensures smooth interoperability with the existing clinical systems, enabling continuous data capture and richer insights.
Perceived lack of RoI	There is uncertainty around cost savings and the impact on study timelines, which creates adoption hesitation among sponsors and CROs.
Resistance to change from traditional methods	Sponsors and sites often resist transitioning from paper-based methods due to the fear of workflow disruption and complex technical integration. Concerns around system failures, data interoperability, and navigating regulatory requirements further delay eCOA adoption.

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Provider landscape analysis

Two leaders hold over 15% of the market share, one is between 5 and 15%, and several other vendors fall under the 5% category

Market share analysis of the providers for this year

2025; percentage of the overall market of the eCOA product

Note: providers are listed alphabetically within each range

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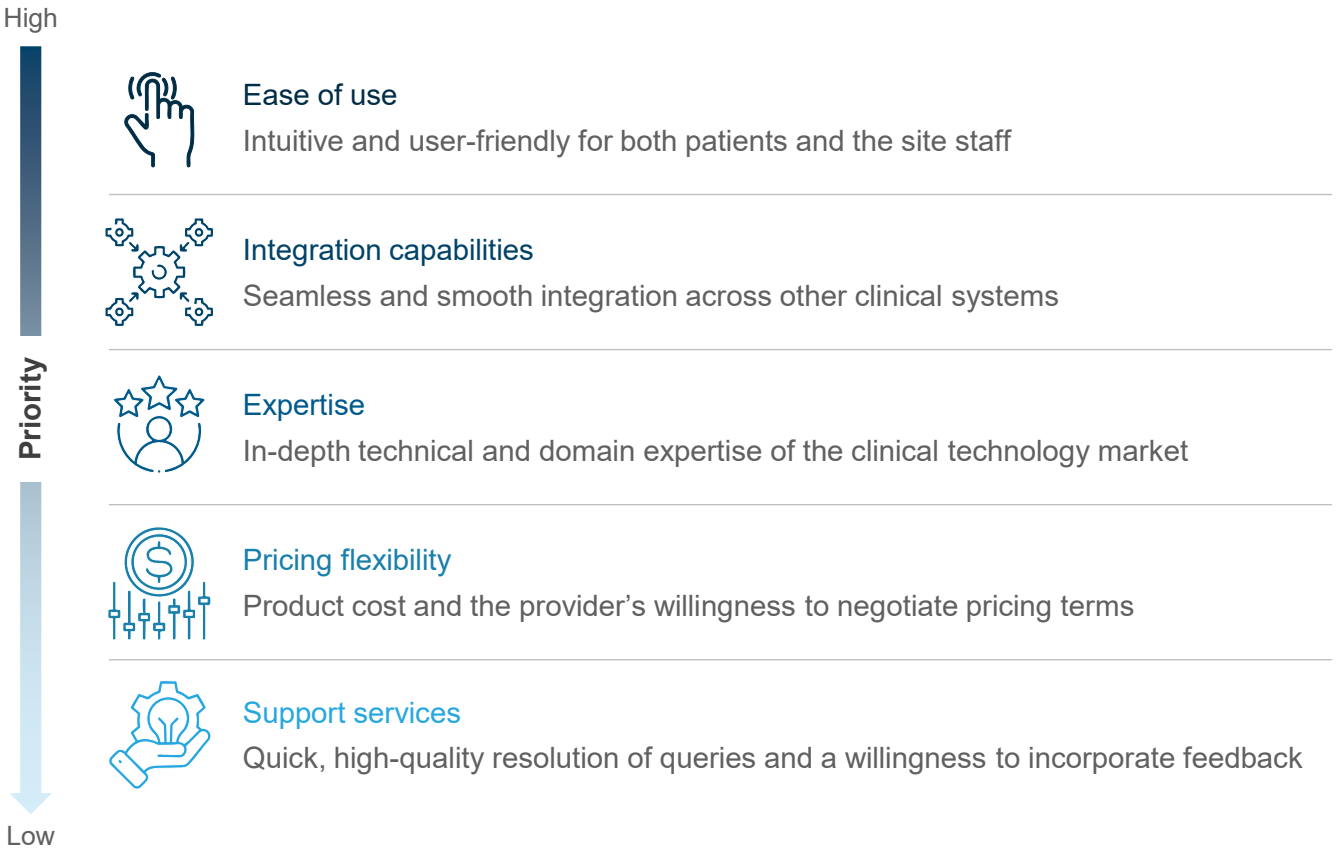
Key buyer considerations

Ease of use and integration capabilities are top sourcing priorities, followed by expertise and pricing flexibility

Key sourcing criteria



Summary analysis

Ease of use, through intuitive and user-friendly interfaces for both patients and site staff, is the top buyer priority, driving engagement and satisfaction.

Integration capabilities are a close second, enabling smooth data exchange, better interoperability, and reduced workflow friction.

Expertise is gaining importance as buyers look for providers with strong domain and technical knowledge to support effective implementation and regulatory compliance.

Flexible pricing and commercial model options remain relevant but rank lower. Buyers value a willingness to negotiate, though cost is no longer the main differentiator.

Support services such as quick issue resolution and openness to feedback are valued, but are generally seen as standard expectations in the selection process.

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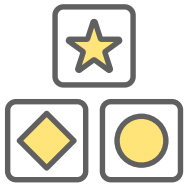
Key takeaways for buyers

Buyers should prioritize providers offering robust patient engagement capabilities and multimodal support, driving higher compliance, richer data capture, and improved study outcomes.

Shifts in provider capabilities

Providers are prioritizing AI use cases and intuitive platform design to streamline navigation, boost engagement, and simplify workflows.



Differentiation across provider types

Large providers deliver extensive scalability and deep domain expertise, while others focus more on innovation and user experience.

Key innovations

Unified eCOA with eConsent, wearables, and avatars helps in a seamless patient journey and in incorporating AI agents to generate study configurations more quickly, reducing the timeline.

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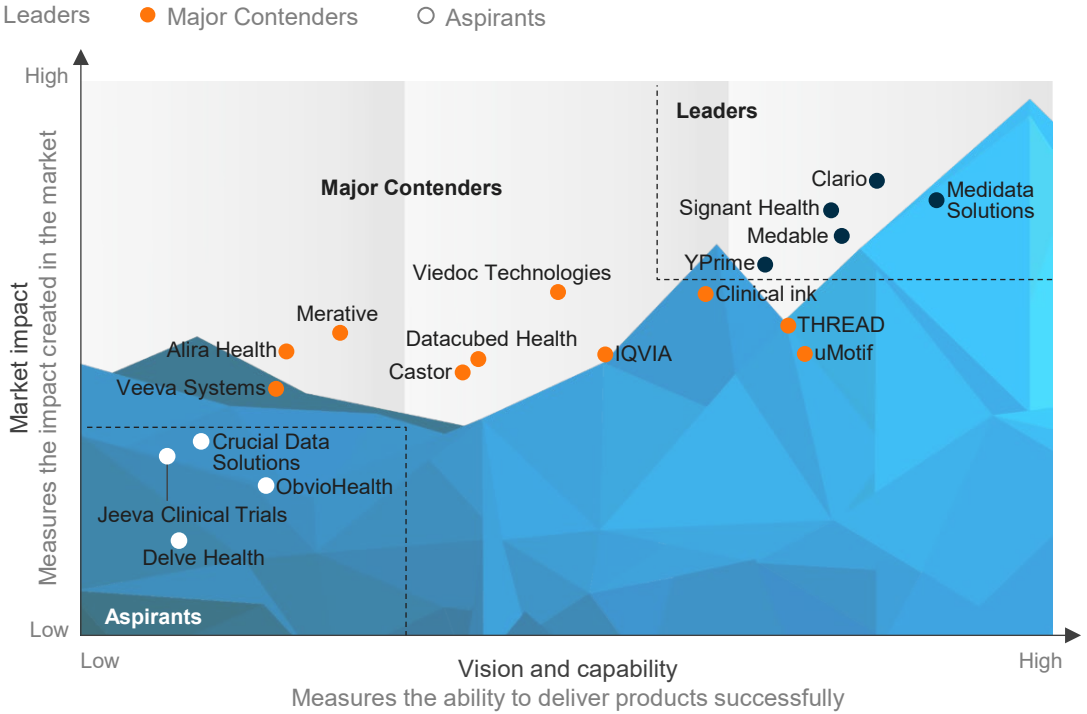
Summary of key messages

Everest Group PEAK Matrix® for eCOA products

Everest Group classified 19 eCOA product providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework to assess the overall vision, capability, and market impact of platform providers.

- **Leaders:** there are 5 eCOA product providers in the Leaders category – Clario, YPrime, Medable, Medidata Solutions, Signant Health
- **Major Contenders:** the Major Contenders category has 10 eCOA providers –Alira Health, Castor, Clinical ink, Datacubed Health, IQVIA, Merative, THREAD, uMotif, Veeva Systems, Viedoc Technologies
- **Aspirants:** there are 4 eCOA product providers in the Aspirants category – Crucial Data Solutions, Delve Health, ObvioHealth, Jeeva Clinical Trials

Everest Group Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2025[1]



1 Assessments for Clinical ink, ObvioHealth, Signant Health, and Veeva Systems excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2025)

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Life Sciences eCOA PEAK Matrix® characteristics

PEAK Matrix framework

Everest Group PEAK Matrix for eCOA products

Characteristics of Leaders, Major Contenders, and Aspirants

Provider capability summary dashboard

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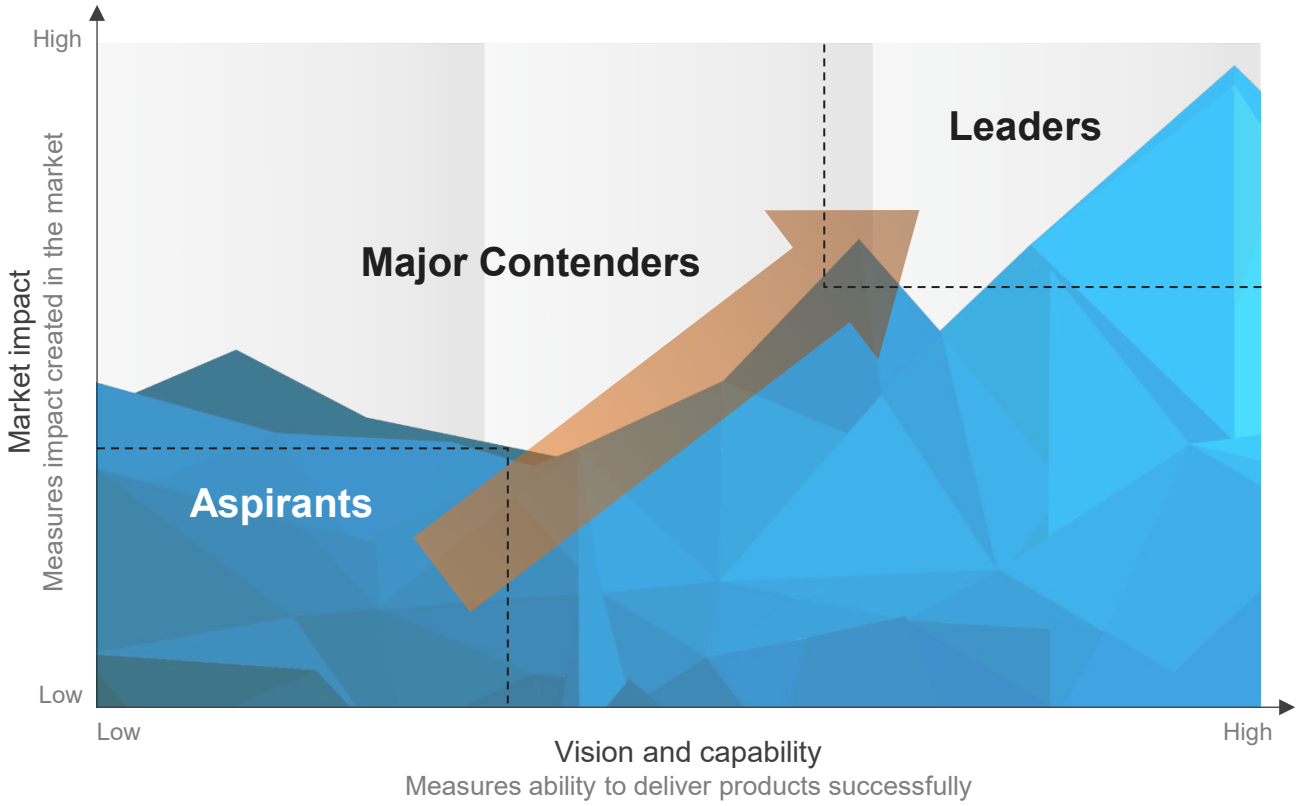
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



Please click Everest Group PEAK Matrix® for more information

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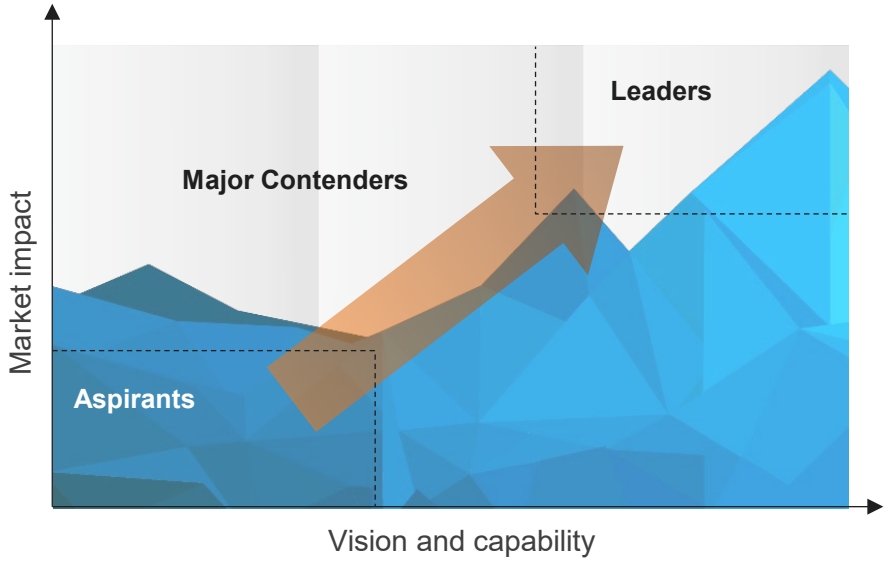
Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth

Portfolio mix
Diversity of client base across industries, geographies, environments, enterprise size class

Value delivered
Value delivered to the client based on customer feedback and other measures



Measures ability to deliver products successfully. This is captured through five subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Technology capability
Technical sophistication and breadth/depth across the technology suite

Flexibility and ease of deployment
Configurability/customize-ability, hosting and tenancy, integration, governance, and security and compliance

Engagement and commercial model
Progressiveness, effectiveness, and flexibility of engagement and commercial models

Support
Training, consulting, maintenance, and other support services

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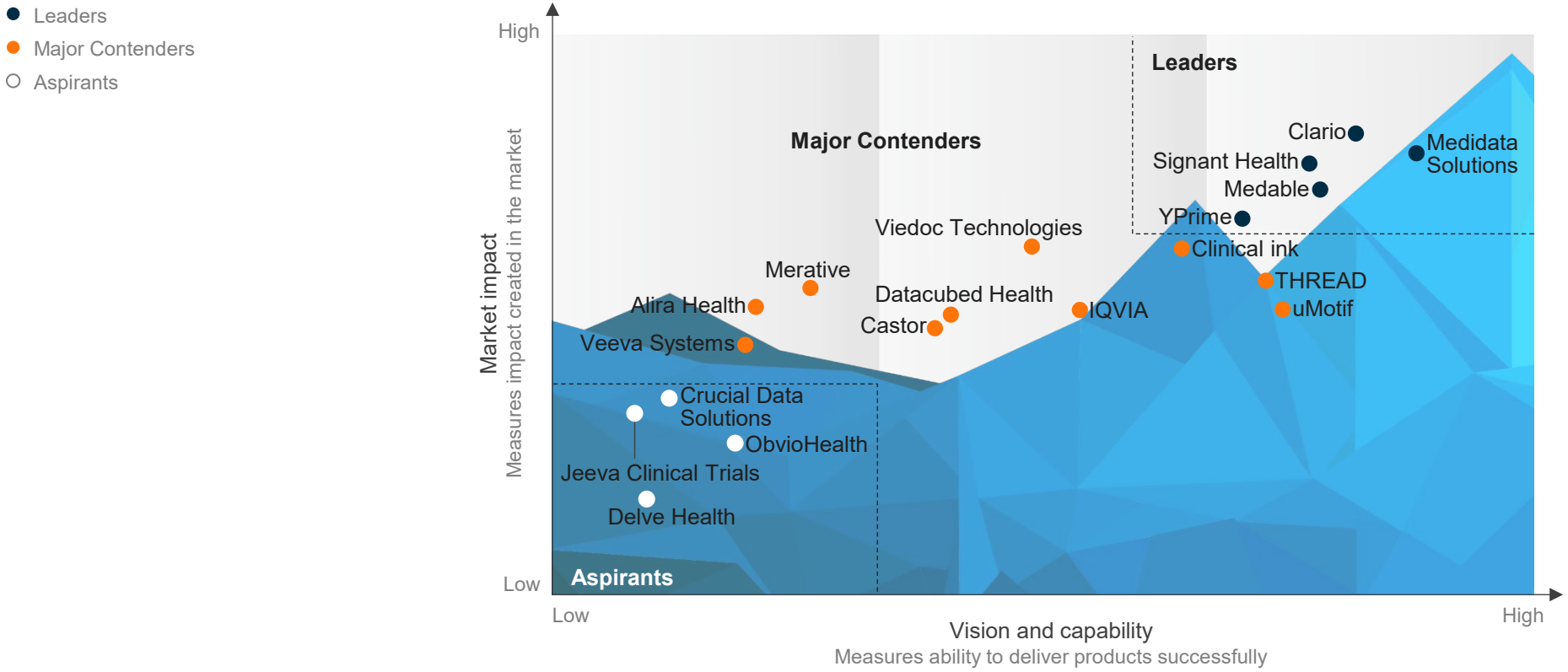
Everest Group PEAK Matrix®

Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2025

Everest Group Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2025[1]



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Source: Everest Group (2025)

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Life sciences eCOA products PEAK Matrix® characteristics

Leaders

Clario, Medable, Medidata Solutions, Signant Health, and YPrime

- Leaders enjoy strong brand recall and are widely recognized as top-tier eCOA software providers, valued by clients for their comprehensive and well-rounded capabilities
- These providers are actively investing in AI/ML to enhance real-time analytics, reporting, localization, and overall platform efficiency—helping accelerate study timelines
- They offer robust multimodal capabilities, supporting data capture across web, mobile apps, and BYOD setups, reinforcing their technical maturity
- Their advanced reporting and visualization capabilities are consistently cited by buyers as key differentiators, contributing to stronger decision-making and improved trial oversight

Major Contenders

Alira Health, Castor, Clinical ink, Datacubed Health, IQVIA, Merative, THREAD, uMotif, Veeva Systems, Viedoc Technologies

- Major Contenders are appreciated by buyers for their competitive pricing and flexible commercial constructs, though they generally have lower brand recall compared to Leaders
- These providers are recognized for offering responsive and high-quality support services, with buyers highlighting prompt resolution of issues
- While support is strong, there is an opportunity to enhance client enablement by introducing more self-help tools and automated diagnostics to address common technical challenges
- Major Contenders offer intuitive and user-friendly interfaces, with buyers noting ease of navigation and overall positive user experience

Aspirants

Crucial Data Solutions, Delve Health, Jeeva Clinical Trials, and ObvioHealth

- Aspirants offer strong multimodal and data collection capabilities, including pre-validated eCOA instrument libraries and adaptive survey designs
- Aspirants lack a robust partnership network, with fewer established collaborations across technology vendors and Contract Research Organizations (CROs), limiting their ecosystem maturity and market reach
- There is scope for improvement in user experience (UI/UX) and strategic investments in AI/ML, where they currently trail peers in platform intelligence and automation
- These providers can strengthen patient engagement by building integrated features that allow participants to track and manage study-related activities—boosting adherence and satisfaction
- Integration with other clinical systems remains a key area of improvement, as buyers seek more seamless and interoperable solutions to streamline workflows

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Summary dashboard | market impact and vision and capability assessment of providers for eCOA Products (page 1 of 4)

Leaders

Measure of capability: Low High

	Market impact				Vision and capability					
Provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
Clario										
Medable										
Medidata										
Signant Health										
YPrime										

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Summary dashboard | market impact and vision and capability assessment of providers for eCOA Products (page 2 of 4)

Major Contenders

Measure of capability: Low High

	Market impact				Vision and capability					
Provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
Alira Health										
Castor										
Clinical Ink										
Datacubed Health										
IQVIA										

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Summary dashboard | market impact and vision and capability assessment of providers for eCOA Products (page 3 of 4)

Major Contenders

Measure of capability: Low High

	Market impact				Vision and capability					
Provider	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
Merative										
THREAD										
uMotif										
Veeva										
Viedoc										

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Summary dashboard | market impact and vision and capability assessment of providers for eCOA Products (page 4 of 4)

Aspirants

Measure of capability: Low High

Provider	Market impact				Vision and capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
Crucial data solutions										
Delve Health										
Jeeva										
ObvioHealth										

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Enterprise sourcing considerations

Leaders

- Clario
- Medable
- Medidata Solutions
- Signant Health
- YPrime

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Clario

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clario's integration capabilities are strong, enabling smooth and seamless connectivity across systems such as EDC, CTMS, and wearable devices
- It offers robust reporting capabilities, ranging from customized reports to real-time monitoring dashboards, effectively meeting client requirements
- It provides comprehensive data collection capabilities, including ePRO, eClinRO, and ePerfRO, as well as other eCOA modalities
- Its eCOA portfolio includes comprehensive multimodal capabilities, supporting a wide range of data collection methods and offering an intuitive UI/UX
- It has a strong market presence, supported by technology-specific partnerships for its eCOA offerings
- Clario has experience across multiple therapeutic areas and possesses the capability to support complex clinical trials, including those requiring image and video capture

Limitations

- Clients perceive Clario as relatively expensive and not competitively priced compared to other providers
- Clients have reported challenges with setting up email notifications, suggesting that the process could be more standardized
- Offering e-learning modules on specifically technical aspects could help site users navigate the platform more easily and improve overall usability
- Clients have indicated that deployment timelines could be more efficient, noting that the current process is time consuming

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Medable

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients state that one of Medable's key strengths is its ability to offer flexible pricing models, and they consider its pricing to be highly competitive and favorable
- It offers strong patient engagement capabilities, including automated reminders and built-in features that allow patients to track and manage their activities effectively
- It has built a robust partnership ecosystem, spanning technology providers, system integrators, and CROs
- Its overall eCOA roadmap is strong, with a clear focus on leveraging emerging technologies such as AI to enhance its capabilities
- It offers good multimodal and data collection capabilities, supporting a wide range of eCOA modalities to ensure flexible data capture

Limitations

- Clients feel that the UI/UX could be improved, especially within the helpdesk section, to enhance usability and support efficiency
- Clients have noted a lack of adequate training around the platform's reporting capabilities, which leads to confusion and hinders the effective use of reporting features
- Clients stated that its eClinRO offering is not available across all therapeutic areas, limiting its applicability to certain studies

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Medidata Solutions

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
●	◔	◔	◔	●	◔	◔	◔	◔	◔

Strengths

- Medidata Solutions has strong data integration capabilities with key clinical systems, such as EHR, EDC, CTMS, eCRF, wearables, medical devices, eConsent, and IRT, enabling efficient data flow and interoperability
- Clients commend its patient engagement capabilities, highlighting built-in features that allow patients to track and manage their activities, along with automated notifications and reminders
- Its reporting capabilities are strong, and it offers both standard and customized reports tailored to meet specific client needs
- Clients have stated that the platform is highly scalable and that they have not encountered any performance issues, even with large-scale deployments
- It has strong multimodal and data collection capabilities, supporting access from web to mobile apps, along with including ePRO, eObsRO, and other eCOA modalities

Limitations

- Medidata's commercial model is relatively fixed. and clients expect more tailored pricing, especially for CNS and neuroscience-focused studies, to better align with the unique needs of these therapeutic areas
- While it is able to justify its pricing with the value offered, clients still perceive it as expensive
- It is primarily focused on large clients, but should consider expanding its focus to include midsize clients in order to diversify its portfolio and capture broader market opportunities

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Signant Health

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Signant Health's eCOA solution enjoys strong brand recall and is recognized for its thought leadership within the clinical trials industry
- It offers strong reporting capabilities, including both standardized and customized reports, along with built-in analytics tools for identifying trends and supporting data-driven decision-making
- It offers robust integration capabilities, including seamless connectivity with systems such as EDC, CTMS, and wearable devices, ensuring efficient data flow across the clinical ecosystem
- It offers good multimodal capabilities, supporting a wide range of data collection methods across various devices and platforms to enhance flexibility and user accessibility
- It offers a pre-validated library of eCOA instruments, adaptive survey design, and ePRO capabilities, showcasing strong and comprehensive data collection capabilities

Limitations

- It should expand its partnership ecosystem to include a broader range of collaborators and enhance service delivery
- It should focus on midsize clients as well to expand its client base and improve its overall portfolio mix
- It should offer built-in features that enable patients to track and manage their activities, which would enhance engagement and ensure better patient adherence

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YPrime

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall
◔	◔	◔	◕	◔	◑	◔	◑	◔	◕

Strengths

- Yprime's data collection capabilities are strong, and it offers ePRO, eClinRO, adaptive survey design, dynamic question branching, and other eCOA functionalities
- It has a strong global presence and effectively cater to clients of all sizes
- Clients regard it to be a strategic and consultative partner, reflecting its collaborative approach
- Clients praise its overall ability to customize the product according to sponsor requirements, a level of flexibility not commonly offered by many other providers
- YPrime demonstrates a strong strategic vision, evident in its acquisition of Tryl to enhance patient engagement solutions and its focus on AI-driven training initiatives
- It offers adaptive survey design capabilities along with a pre-validated library of eCOA instruments

Limitations

- Clients have reported limited integration capabilities, noting that the integration process is complex and time consuming and lacks advanced functionality
- While the platform offers standardized reporting, it falls short in delivering high-quality customized reports, which has been a point of concern for clients
- Clients have expressed concerns that while its pricing continues to increase, there is no corresponding advancement in its technical capabilities
- While the patient-facing UI/UX is well-designed and user-friendly, the site-facing interface lacks intuitiveness

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Enterprise sourcing considerations

Major Contenders

- Alira Health
- Castor
- Clinical ink
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- IQVIA
- Merative
- THREAD
- uMotif
- Veeva Systems
- Viedoc Technologies

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Alira Health

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Alira Health offers flexible commercial models, allowing clients to choose options that best align with their specific needs
- It has a strong global presence and serves clients of all sizes, including large, midsize, and small enterprises, demonstrating a well-diversified portfolio mix
- Its support services are highly effective, and it consistently provides quality resolutions to client issues

Limitations

- It does not offer the Single Sign-on (SSO) functionality, which is a notable gap, considering that most other providers include this as a standard feature
- It should consider incorporating built-in analytics tools to identify trends and anomalies in patient data, which would enhance data-driven decision-making
- The platform lacks integration with Clinical Trial Management System (CTMS) and Interactive Response Technology (IRT) systems, which limits its interoperability and data integration capabilities
- It currently lacks a pre-validated library of eCOA instruments and should consider incorporating one to enhance standardization and efficiency

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Castor

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients value Castor's proactive engagement and consider it to be a strategic and consultative partner. They also appreciate its responsive support and quick resolution of issues
- Castor offers robust data integration capabilities across key clinical systems such Electronic Data Capture (EDC), Electronic Health Record (EHR), Clinical Trial Management System (CTMS), and wearable devices, enabling seamless data flow and interoperability
- It has established partnerships with system integrators, CROs, and technology partners to enhance solution delivery and ecosystem integration
- It offers eCOA-specific AI use cases aimed at reducing study timelines and overall costs
- Castor possesses strong multimodal capabilities, offering both web and mobile apps for data collection, thereby providing flexibility to users

Limitations

- The platform lacks built-in analytics tools for identifying trends and does not offer predictive capabilities to forecast issues such as patient dropout
- Buyers have indicated that there is room for improvement in streamlining the patient enrollment process and reducing the number of steps to make it more seamless
- Clients have noted issues with the reminder functionality and suggest that Castor needs to offer more customized reminders based on patient responses to enhance engagement

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Clinical ink

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clinical ink offers strong multimodal capabilities, providing seamless access across both web and mobile app platforms
- Clients acknowledge and appreciate its capabilities, which contributes to strong brand recall and recognition in the market
- It offers excellent integration capabilities across various systems, enabling smooth data flow and enhanced interoperability within the clinical ecosystem
- It offers strong reporting and visualization capabilities, enabling clear, actionable insights through intuitive dashboards and customizable charts

Limitations

- While it is currently integrating AI for dashboard enhancements, it should further expand its use of AI across other areas to stay ahead in the market
- It should incorporate built-in features that allow patients to track and manage their activities, which would significantly enhance its patient engagement capabilities
- It needs to improve its thought leadership by publishing content, such as blogs, whitepapers, and case studies, more frequently

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Datacubed Health

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients appreciate Datacubed Health's advanced patient engagement capabilities, noting the wide range of features offered, which enhance user interaction and adherence
- While its pricing is competitive, it offers a range of commercial models to accommodate diverse client needs
- Clients appreciate its support services, highlighting the team's responsiveness and ability to provide quick resolutions to issues
- It incorporates behavioral science principles, including gamification, which gives it a competitive edge, especially in driving patient engagement
- It offers strong multimodal capabilities, providing seamless access across platforms from web to mobile apps, to support diverse user preferences and enhance accessibility
- It caters to clients of all sizes and has a strong global presence, reflecting a well-balanced portfolio mix and broad market reach

Limitations

- It could focus on strengthening its partnership ecosystem, which is currently concentrated primarily on technology and cloud providers, by expanding collaborations with CROs and system integrators
- Its reporting capabilities are relatively basic, and it should consider offering built-in analytics tools for identifying trends to provide deeper insights and support data-driven decision-making
- It does not offer integration with eConsent platforms or EHR systems, which limits its overall integration capabilities and interoperability within the clinical ecosystem

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IQVIA

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- IQVIA offers flexible commercial models, allowing clients to choose pricing structures that best align with their specific needs and budgets
- It provides training for both sites and patients, and its quick deployment timelines further strengthens its overall implementation capabilities
- It offers a user-friendly interface with intuitive drag-and-drop functionality, making the platform easy to navigate and operate
- It offers strong data collection capabilities, including ePRO, dynamic survey design, and a pre-validated library of eCOA instruments, supporting comprehensive and flexible data capture

Limitations

- There is room for improvement in patient engagement capabilities, especially in enhancing notifications for missed diary entries to support better compliance
- While it offers integration with various clinical systems, it still lacks integration with EHRs. This could be a point of concern for some clients
- While its primary focus is on the North American market, it should consider expanding further into Europe to strengthen its global footprint and tap into new growth opportunities
- There is further scope to diversify its partnership landscape beyond technology partnerships

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Merative

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients commend Merative for its quick responsiveness and timely resolution of queries
- Merative is recognized for being cost-efficient and effective, offering multiple and flexible pricing models to accommodate diverse client needs
- Its data integration capabilities are commendable, with no latency or lag, ensuring smooth and efficient data flow across systems
- Clients consider it to be a strategic partner, as it actively collaborates to refine the overall roadmap by incorporating client feedback
- It offers good integration with wearables, with clients stating no lag or latency. Clients also value its scalability across both geographies and therapeutic areas

Limitations

- Merative can further enhance its visualization capabilities by offering customizable charts and reports, better aligning with clients' specific reporting needs
- Clients believe that its training materials could be more patient-centric
- Clients have stated that enhancing automated reminder functionalities could help improve overall patient engagement
- Its multimodal support is currently limited, and there is scope to enhance its app by incorporating more patient-centric features such as patient support and gamification elements to improve overall usability and engagement
- While Merative has a strong emphasis on the North American market, there is further opportunity to broaden its global footprint by increasing its presence in Europe and APAC

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THREAD

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients appreciate THREAD's patient engagement capabilities and built-in features that allow patients to track and manage their activities effectively
- It offers robust standard and customized reporting capabilities, along with built-in analytics tools for identifying trends, demonstrating a strong focus on leveraging AI and analytics to enhance reporting and insights
- Clients appreciate its pricing flexibility and have noted that its pricing is competitive compared to other providers in the market
- It provides strong support services, and clients consider it to be a strategic partner
- It offers multiple data collection capabilities, including ePRO, a pre-validated library of eCOA instruments, and adaptive survey design, enabling comprehensive data capture

Limitations

- Clients mentioned that the data integration process with other clinical systems, such as EDC, could be made smoother to enhance overall efficiency and interoperability
- It can focus on further enhancing its thought leadership efforts, such as publishing blogs, whitepapers, and case studies to strengthen its market presence and industry visibility
- It should focus on expanding its partnership ecosystem beyond current technology collaborations to include system integrators to enhance solution delivery
- It is currently more focused on the North American market and should consider expanding further into Europe to strengthen its global footprint and tap into new growth opportunities
- Buyers believe there is room for improvement in the UI/UX, suggesting it could be made more intuitive to enhance user experience

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uMotif

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- uMotif's patient engagement capabilities, such as reminders and notifications, are highly effective and offer a high degree of customization
- Clients commend its visualization capabilities, especially the availability and quality of customizable charts and graphs
- It offers built-in analytics tools for identifying trends, along with well-designed dashboards and reports tailored to specific client needs
- It provides excellent support services, characterized by a proactive approach and a strong willingness to listen to client needs, delivering high-quality resolutions
- It offers smooth integration across key clinical systems, including wearables, eCRF, CTMS, and EHR, ensuring seamless data flow and interoperability

Limitations

- Clients perceive uMotif as relatively expensive compared to other eCOA providers
- To strengthen its global presence, the company should consider expanding further into Europe beyond just the UK, rather than focusing primarily on the North American market
- Clients stated that there is room to further improve average deployment timelines, highlighting the potential for more streamlined implementation

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Veeva Systems

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Veeva Systems offers strong multimodal capabilities, supporting access through mobile, tablet, web, and Bring Your Own Device (BYOD) platforms, ensuring flexibility
- It has a robust partnership ecosystem that includes system integrators, CROs, and technology providers
- Its deployment time is relatively short, enabling faster implementation and quicker time-to-value for clients

Limitations

- Veeva should consider incorporating integration with wearables to strengthen its overall integration capabilities
- It currently does not offer SSO functionality
- With emerging technologies gaining momentum, it should place greater emphasis on analytics. Currently, it does not offer built-in analytics tools for identifying trends, indicating a potential area for enhancement
- The platform currently lacks integration with EHR systems and medical devices, limiting its interoperability
- It should consider incorporating adaptive survey design and multimedia elements to enhance its data collection capabilities and improve patient engagement

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Viedoc Technologies

Everest Group assessment – Major Contender

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Buyers appreciate the pricing and commercial models offered by Viedoc Technologies, noting that they receive fair value for the overall offering
- Clients acknowledge the support services, highlighting timely and effective issue resolution as a key strength
- Buyers frequently regard it as a strategic and consultative partner, valuing its collaborative approach and industry expertise
- It has a strong global footprint, with a presence across key regions such as North America, Europe, South America, and APAC, successfully catering to clients of all sizes
- The UI/UX is intuitive and user-friendly, allowing end-users to navigate and operate the platform with ease

Limitations

- There is no dedicated mobile app; although web-app functionality is available, clients state that the lack of a native app negatively impacts patient engagement and accessibility
- Clients have noted that the data integration modules are somewhat complex and not straightforward to implement. Furthermore, the platform lacks integration with EHR systems, which limits overall interoperability and seamless data exchange
- Clients feel that the platform is limited in language support and lacks the flexibility to modify certain interface languages, which hampers scalability across diverse geographies
- They believe that the reporting capabilities could be improved, especially in the area of customized reports, and have noted the absence of built-in analytics tools for identifying trends

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Enterprise sourcing considerations

Aspirants

- Crucial Data Solutions
- Delve Health
- Jeeva Clinical Trials
- ObvioHealth

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Crucial Data Solutions

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Crucial Data Solutions' overall integration capabilities are strong, and it offers seamless connectivity with other systems such as EDC and CTMS, and related clinical platforms
- It offers customizable reports tailored to specific needs, including site-level and sponsor-level views, as well as real-time monitoring dashboards
- It offers ePRO and eClinRO capabilities, along with a pre-validated library of eCOA instruments and support for multimedia elements, demonstrating strong data collection capabilities

Limitations

- The platform's design is not visually appealing, and there is scope to improve the UI/UX to make it more user-friendly and engaging
- Crucial Data Solutions is primarily focused on the North American market. To strengthen its global presence, it should consider expanding its client base across other geographies
- It should invest more in thought leadership initiatives, such as publishing blogs, whitepapers, and case studies, to enhance market awareness and strengthen its industry presence

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Delve Health

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients have highlighted Delve Health's high responsiveness, 24/7 support availability, and the ability to deliver quality resolutions within a short turnaround time
- Clients have praised its UI/UX design, and they particularly value its intuitive drag-and-drop functionality, which enhances ease of use and efficiency
- It offers good data integration capabilities across major clinical systems, including EHR, EDC, eCRF, medical devices, eConsent, IRT, and wearables, ensuring interoperability. Clients appreciate its integration strength with wearable devices

Limitations

- It currently does not offer SSO functionality
- It should explore offering more flexible commercial models, as clients have indicated that its current pricing structure could be improved further
- It should consider expanding its footprint into additional geographies to broaden the client base and strengthen the global presence
- It should enhance its focus on thought leadership by regularly publishing blogs, whitepapers, and other insightful content to boost brand awareness and establish industry credibility

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Jeeva Clinical Trials

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- Clients appreciate Jeeva's support services, highlighting its quick responsiveness and efficient issue resolution
- Jeeva Clinical Trials supports multimodal capabilities, enabling flexible data collection across various platforms and devices to accommodate diverse user needs
- Clients appreciate its pricing and feel that the solutions are fairly priced relative to the value delivered
- It offers strong data collection capabilities, including ePRO and eClinRO, and a pre-validated library of eCOA instruments, supporting comprehensive and reliable data capture
- It also demonstrates a good focus on rare disease clinical trials

Limitations

- It does not offer integration with wearables, EHR systems, or medical devices, an area where many other providers are already offering solutions, highlighting a key gap in its interoperability capabilities
- Its major focus is on the North American market; however, it should consider expanding into other geographies to strengthen its global presence and tap into new growth opportunities
- Clients have mentioned experiencing occasional email glitches and noted the absence of built-in features for patients to track and manage their activities, which hinders the overall patient engagement capabilities
- The platform lacks built-in analytics tools for identifying trends, limiting the ability to gain actionable insights from collected data
- Clients feel that the platform could be made more intuitive to enhance user experience

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ObvioHealth

Everest Group assessment – Aspirant

Measure of capability: Low High

Market impact				Vision and capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Flexibility and ease of deployment	Engagement and commercial model	Support services	Overall

Strengths

- ObvioHealth offers good data integration capabilities with clinical systems such as EDC, EHR, CTMS, and wearable devices
- It offers strong client management capabilities, and its support services are consistently praised for their responsiveness and quality
- ObvioHealth has good multimodal capabilities, providing seamless access across both web and mobile app platforms
- It also supports adaptive design and offers a pre-validated library of eCOA instruments, demonstrating strong data collection capabilities

Limitations

- Currently, its focus is primarily on the North American market; however, it should expand into other geographies to diversify its portfolio
- Its partnership ecosystem is relatively limited, and it should consider expanding it to include a broader range of partnerships
- It should consider offering built-in features that allow patients to track and manage their activities, which would further enhance its patient engagement capabilities

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Appendix

Glossary

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Glossary of key terms used in this report

AI	Artificial Intelligence is the simulation of human intelligence and decision-making capability by machines
Aspirants	Aspirants are the third set of platform providers rated by Everest Group, according to Everest Group's proprietary scoring methodology. They have moderate experience and delivery capability
BYOD	Bring Your Own Device. Refers to being allowed to use one's personally-owned device, rather than being required to use an officially provided device
CRO	A Contract Research Organization is an organization that provides research services to firms in the life sciences industry on a contract basis
DCT	Decentralized Clinical Trial. DCTs are defined as studies executed through telemedicine and mobile/local healthcare providers, using processes and technologies differing from the traditional clinical trial model
eCOA	Electronic Clinical Outcomes Assessment. eCOAs are a method of capturing outcomes data electronically in clinical trials. eCOA employs technologies such as handheld devices, tablets, or the web to allow trial participants, physicians, and caregivers to directly report information related to healthcare outcomes
eConsent	It is the use of electronic systems and processes that may employ multiple electronic media, including text, graphics, audio, video, podcasts, passive and interactive web sites, biological recognition devices, and card readers, to convey information related to the study to obtain and document informed consent
ePRO	Electronic patient-reported outcome. ePROs allow patients to answer questions and report on their health through an electronic device, such as a smartphone or tablet
IoT	Internet of Things refers to a system or a network and connected devices such as computers and sensors, which can interact through data exchange and use analytics algorithms to make decisions
ITS	Information Technology Services is the transfer of ownership of some or all information technology processes or functions to a service provider. This could include core, administrative, delivery, or management-related processes or functions
Leaders	Leaders are the highest rated platform providers, according to Everest Group's proprietary scoring methodology, with top-quartile performance across market success and capability
LS	Life Sciences – Everest Group defines the life sciences industry to include organizations in the fields of pharmaceuticals, biotechnology, and medical devices
Major Contenders	Major Contenders are the second-highest rated platform providers, according to Everest Group's proprietary scoring methodology, with second or third quartile performance across market success and capability
Televisits	Televisits are a safe and secure way for you to connect to a doctor remotely, via video and audio connection either on a smartphone or a computer

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