Everest Group®

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

Focus on Viedoc Technologies

August 2025

PEAK MATRIX®

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

- **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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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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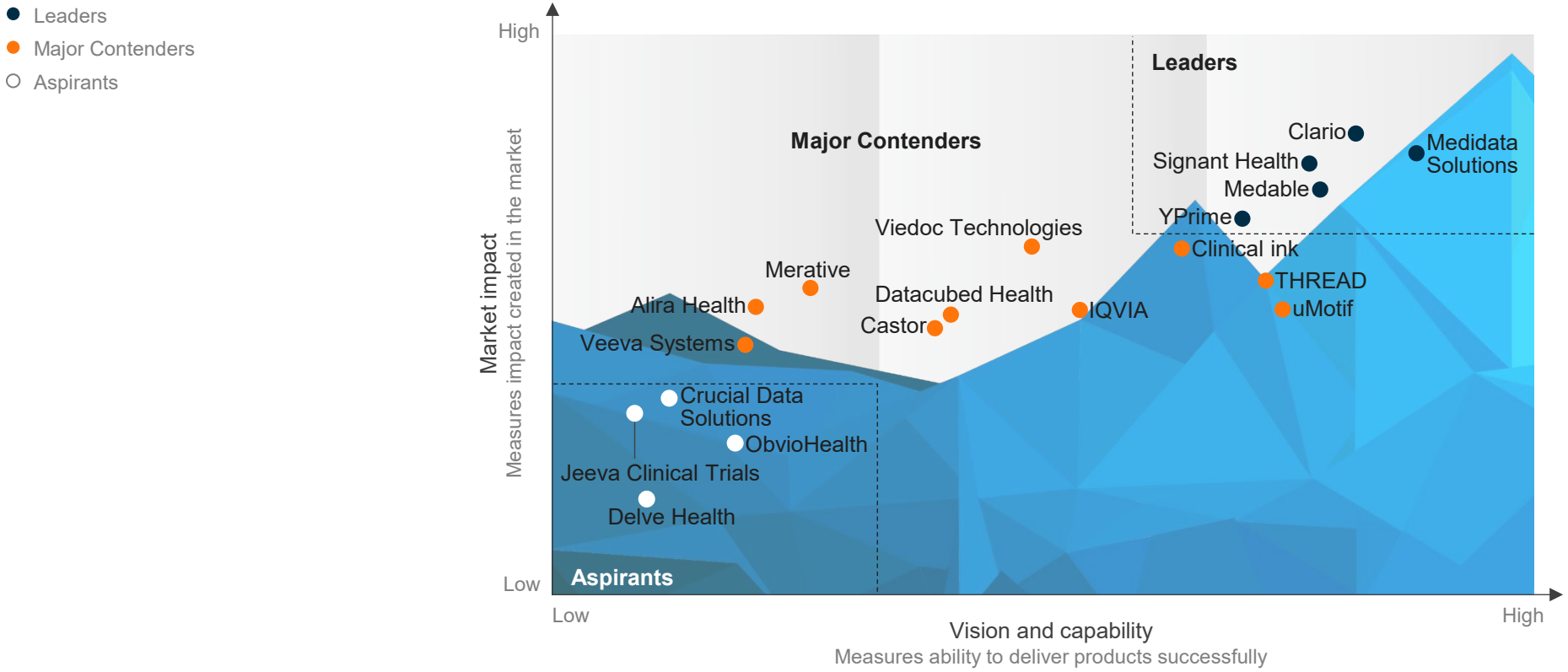
Everest Group PEAK Matrix®

Life Sciences Electronic Clinical Outcome Assessment (eCOA) Products PEAK Matrix® Assessment 2025 | Viedoc Technologies is positioned as a Major Contender

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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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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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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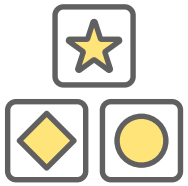
Key takeaways for buyers

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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Appendix

PEAK Matrix® framework

FAQs

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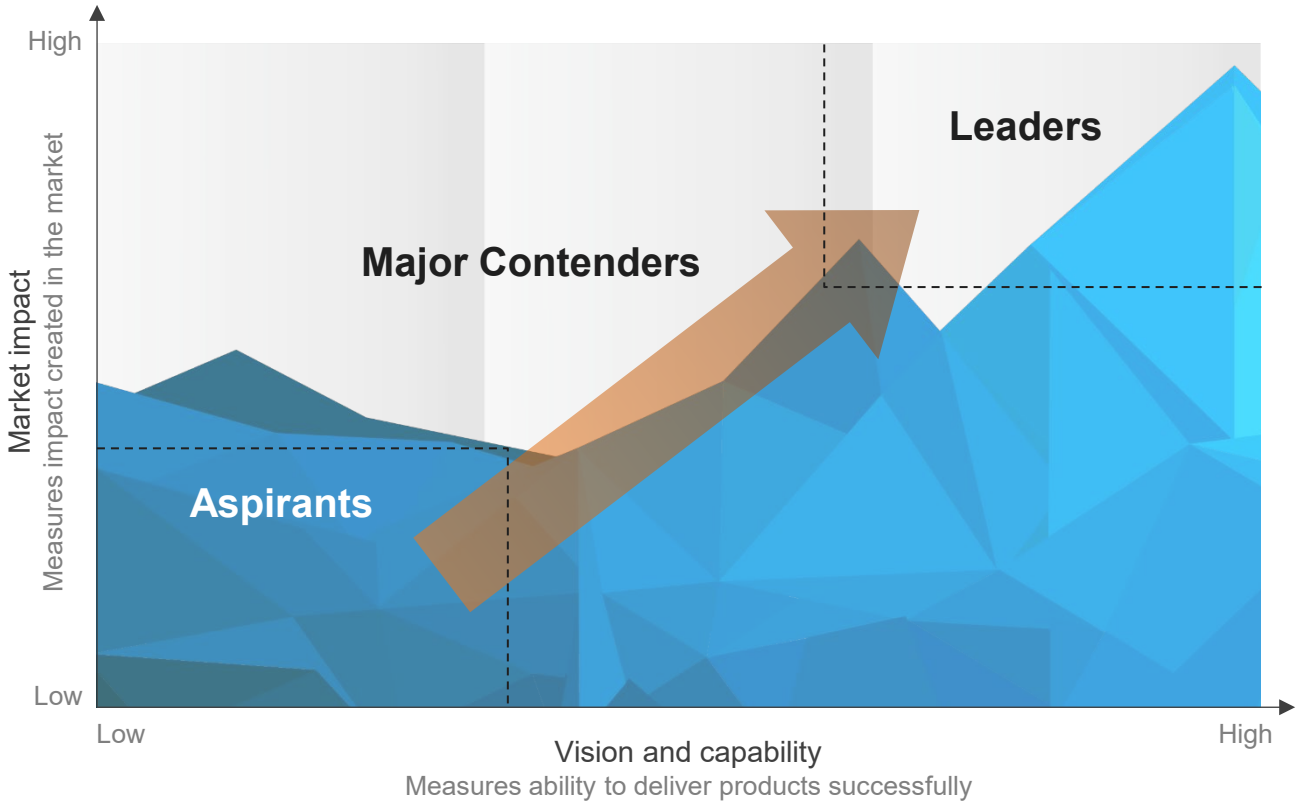
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



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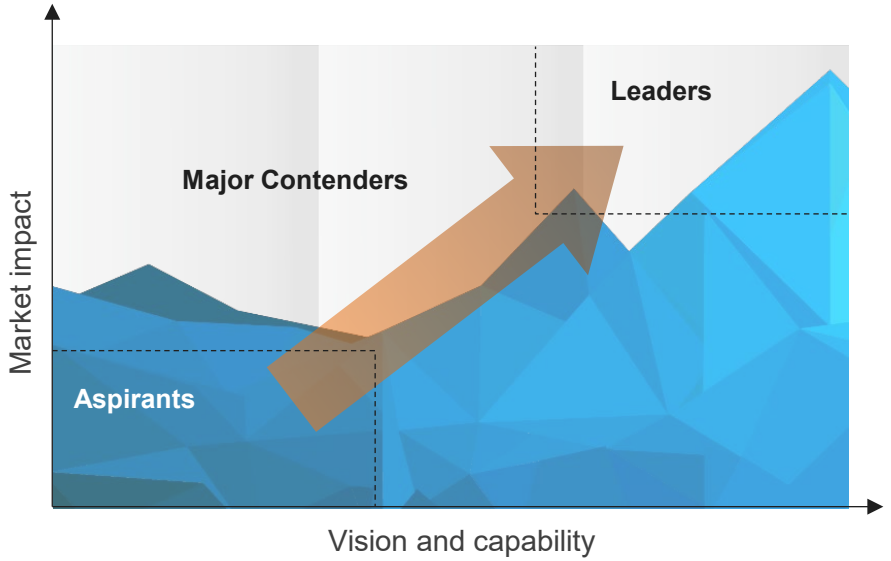
Products PEAK Matrix® evaluation dimensions

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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FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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