

Electronic Clinical Outcome Assessment (eCOA) Solution Market by Modality (Wearable, Mobile, BYOD), Type (PRO, CLINRO, OBSRO, PERFO), Use ([Clinical trial: Onco, Rare, Mental Health], RWE, Registry), End User, and Region - Global Forecast to 2029

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Abstracts

The electronic clinical outcome assessment (eCOA) solutions market is projected to reach USD 3.9 billion by 2029 from USD 1.8 billion in 2024, at a CAGR 16.6% during the forecast period. The the growing inclination towards digital data collection and analysis, an escalating need for economical data collection solutions, and the increasing integration of connected devices in healthcare institutions are the factors that will drive the growth of this market. On the other hand, the sensitivity of patient health data requires robust security measures. Concerns about data breaches, unauthorized access, or cybersecurity threats may impede the adoption of eCOA solutions to a certain extent over the forecast period.

“The BYOD (bring your own device) model segment is estimated to hold the major share in 2023, by type of wearable, mobile and other devices.”

The wearable, mobile and other devices market is bifurcated into BYOD (bring your own device) model, provisioned device model, and hybrid model. The BYOD model segment accounted for the largest market share during the forecast period. The growth of BYOD (Bring Your Own Device) adoption is driven by cost-effectiveness, as it eliminates the need for sponsors to manage dedicated devices, lowering trial costs. Patient familiarity with their own devices enhances user-friendliness, boosting engagement and data quality, while increasing accessibility for geographically dispersed and resource-limited

patients, aligning with decentralized trials. Additionally, technological advancements in secure data encryption address security concerns, and evolving regulations favor secure BYOD implementation in certain regions, positioning it as a cost-efficient, patient-centric approach in clinical trials.

“Clinical trials segment is estimated to hold the largest share of electronic clinical outcome assessment (eCOA) solutions market, by application.”

Based on application, the Electronic Clinical Outcome Assessment (eCOA) Solutions market is segmented into clinical trials, observational studies and real-world evidence (RWE) generation, patient management and registries, and other applications. The clinical trials segment is expected to hold the largest share during the forecast period. The rise of eCOA (Electronic Clinical Outcome Assessment) in clinical trials is driven by a myriad of advantages: heightened data quality achieved through real-time capture and minimized transcription errors, enhanced patient engagement facilitated by user-friendly platforms and improved data ownership, and increased trial efficiency through streamlined data collection and accelerated analysis. This results in superior-quality studies, increased patient satisfaction, and expedited drug development, positioning eCOA as the emerging gold standard for a more efficient, patient-centric future in clinical research.

“Electronic Observer-Reported Outcomes (EOBSRO) segment is expected to register highest growth in the forecast period, by product type segment.”

Based on product type, the Electronic Clinical Outcome Assessment (eCOA) Solutions market is segmented into electronic patient-reported outcomes (EPRO), Electronic Clinician-reported outcomes (ECLINRO), electronic observer-reported outcomes (EOBSRO), and Electronic performance-reported outcomes (EPERFO). In 2023, the electronic observer-reported outcomes (EOBSRO) segment is expected to register highest growth in the forecast period. Observer-reported outcomes (ObsRO) play a crucial role in gathering real-world evidence outside controlled trial settings, informing post-market research and regulatory decisions. Effective patient monitoring in decentralized trials, improved data quality, availability of holistic picture of patient experience and treatment response are some of the factors that contribute to the growth of the segment.

“Asia Pacific to register the highest growth in the electronic clinical outcome assessment (eCOA) solutions market in the forecast period.”

The global electronic clinical outcome assessment (eCOA) solutions market is segmented into four major regions, namely, North America, Europe, APAC, and the Rest of the World. In 2022, Asia Pacific was expected to register the highest growth for electronic clinical outcome assessment (eCOA) solutions systems in the forecast period. Factors such as increasing healthcare expenditure, developing healthcare infrastructure, rising demand for digital solutions in healthcare sector, large patient population, increasing focus on patient-centric care and the need for better data collection and analysis are expected to drive the growth of the electronic clinical outcome assessment (eCOA) solutions market in the Asia Pacific.

Breakdown of the supply-side, demand side, primary interviews by company type, designation, and region:

By Supply Side: Tier 1 (31%), Tier 2 (28%), and Tier 3 (41%)

By Demand Side: Hospital Directors/VPs/Managers/Department Heads (40%), Pharma & Biopharma Company's Product managers, Purchase Heads, etc. (35%), and Others (25%).

By Designation: C-level Executives (31%), Director-level (25%), and Managers (44%)

By Region: North America (45%), Europe (20%), Asia Pacific (28%), and RoW (4%)

The prominent players in this market are Koninklijke Signant Health (US), IQVIA Holdings, Inc. (US), Oracle (US), Clario (US), Medable Inc. (US), Medidata (US), Merative (US), ICON plc (Ireland), Paraxel International (MA) Corporation (US), Climeddo Health GmbH (Germany), Healthentia (Belgium), Veeva Systems (US), assisTek (US), Curebase Inc. (US), Castor (US), EvidentIQ Group GmbH (Germany), YPrime, LLC. (US), Clinical ink (US), Clinion (US), Kayentis (France), TransPerfect (US), ObvioHealth USA, Inc. (US), WCG Clinical (Germany), ClinCapture (US), and Cloudbyz (US). Players adopted organic as well as inorganic growth strategies such as product launches and enhancements, and investments, partnerships, collaborations, joint ventures, funding, acquisition, expansions, agreements, sales contracts, and alliances to increase their offerings, cater to the unmet needs of customers, increase their profitability, and expand their presence in the global market.

Research Coverage

The report studies the electronic clinical outcome assessment (eCOA) solutions market based on component, product type, deployment model, application area, end user, and region.

The report analyzes factors (such as drivers, restraints, opportunities, and challenges) affecting the market growth.

The report evaluates the opportunities and challenges in the market for stakeholders and provides details of the competitive landscape for market leaders.

The report studies micro-markets with respect to their growth trends, prospects, and contributions to the total electronic clinical outcome assessment (eCOA) solutions market.

The report forecasts the revenue of market segments with respect to five major regions.

Reasons to Buy the Report

The report can help established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share. Firms purchasing the report could use one or a combination of the below-mentioned five strategies.

This report provides insights into the following pointers:

Analysis of key drivers (increasing R&D expenditure for product development by medtech, and pharma-biotech companies, rising operational costs and regulatory requirements associated with clinical research studies, favorable government support and funding for clinical trials, growing prevalence of chronic diseases & subsequent increase in clinical trials, effective monitoring of clinical data, reduction in overall costs and timelines of clinical trials), restraints (lack of skilled professionals to develop and operate eCOA solutions, high implementation and maintenance cost, lack of awareness about eCOA solutions among end users), opportunities (surging eCOA adoption owing to increasing

number of clinical trials in emerging economies, growing outsourcing of clinical trial processes to CROs, gradual shift from manual data interpretation to real-time data analysis, growing penetration of mobile technology in healthcare industry), and challenges (evolving regulatory landscape and compliance requirements, interoperability & integration, data security & privacy issues, resistance from traditional healthcare professionals and concerns regarding software reliability) influencing the growth of electronic clinical outcome assessment (eCOA) solutions market.

Product Development/Innovation: Detailed insights on upcoming technologies, research and development activities, and product launches in the electronic clinical outcome assessment (eCOA) solutions market.

Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the markets for various types of electronic clinical outcome assessment (eCOA) solutions across regions.

Market Diversification: Exhaustive information about products, untapped regions, recent developments, and investments in the electronic clinical outcome assessment (eCOA) solutions market.

Competitive Assessment: In-depth assessment of market shares, strategies, products, distribution networks, and manufacturing capabilities of the leading players in the electronic clinical outcome assessment (eCOA) solutions market.

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