Clinical Trial Patient Engagement Products Trailblazer Assessment 2024

September 2024: Complimentary Abstract / Table of Contents

Market Report
Clinical Development Technology

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Background of the research

In the dynamic field of life sciences clinical development, patient engagement has emerged as a critical driver of innovation and success. As clinical research evolves, integrating patient perspectives and active participation has become a transformative force, significantly enhancing the quality and relevance of clinical trials.

This report delves into the pivotal role of patient engagement within the context of clinical development, underscoring its importance in shaping the future of medical research and treatment. Effective patient engagement throughout the clinical trial process, from study design and recruitment to data collection and dissemination of results, ensures that trials are more patient-centric, efficient, and likely to yield meaningful insights.

Patient engagement in clinical development is not merely a regulatory requirement but a strategic imperative. Patients who are engaged are more likely to participate in clinical trials and remain committed throughout the study, thereby reducing dropout rates and accelerating the research timeline. By involving patients in the design and conduct of trials, researchers can collect more relevant data that better reflects real-world experiences and outcomes.

Transparent communication and active involvement of patients foster trust and build stronger relationships between researchers, sponsors, and patient communities. Furthermore, trials designed with patient input are more likely to meet regulatory expectations and produce results that are highly valued by healthcare providers and patients, facilitating smoother market access.

This report will explore practical strategies for incorporating patient engagement into clinical development, from leveraging digital tools and platforms to creating patient advisory boards and using patient-reported outcomes. We will also examine case studies and best practices that illustrate the tangible benefits of patient-centric approaches.

In the quest to develop new therapies and treatments, the voice of the patient is indispensable. Embracing a patient-centered paradigm drives more effective, ethical, and responsive clinical research, ultimately leading to breakthroughs that significantly improve patient lives. This report aims to illustrate how we can transform clinical development through the power of patient engagement, paving the way for a more inclusive and impactful future in life sciences.
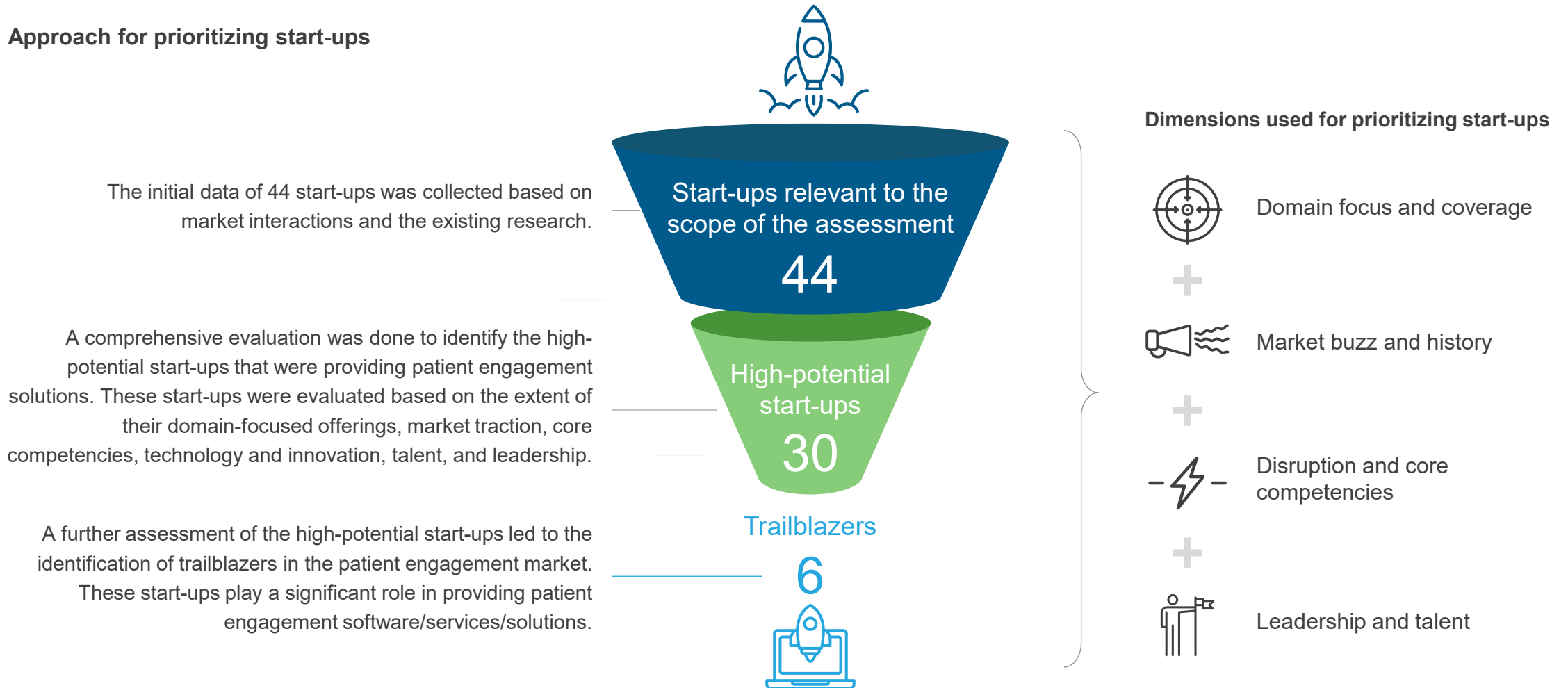
Scope of this report

Geography: global

Industry: life sciences

Services: patient engagement

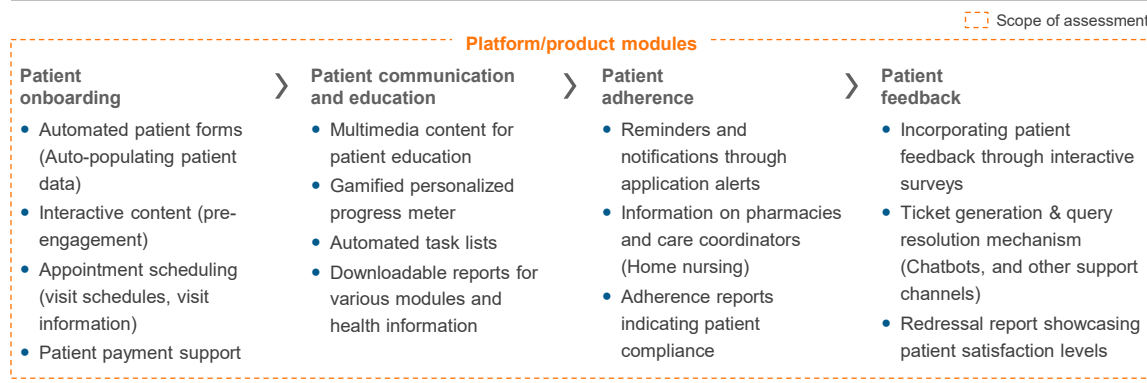**Use cases:** 6 leading start-ups in the patient engagement industry

Everest Group analyzed 44 start-ups on key dimensions to shortlist the top six trailblazers in the patient engagement market

Approach for prioritizing start-ups

The initial data of 44 start-ups was collected based on market interactions and the existing research.

A comprehensive evaluation was done to identify the high-potential start-ups that were providing patient engagement solutions. These start-ups were evaluated based on the extent of their domain-focused offerings, market traction, core competencies, technology and innovation, talent, and leadership.

A further assessment of the high-potential start-ups led to the identification of trailblazers in the patient engagement market. These start-ups play a significant role in providing patient engagement software/services/solutions.

Start-ups relevant to the scope of the assessment

44

High-potential start-ups

30

Trailblazers

6

Dimensions used for prioritizing start-ups

Domain focus and coverage

+

Market buzz and history

+

Disruption and core competencies

+

Leadership and talent

This study offers distinct chapters providing a deep dive into key aspects of patient engagement market; below are four charts to illustrate the depth of the report

Everest Group's view of the patient engagement platforms

Platform/product modules

⌐ Scope of assessment ⌐

Patient onboarding › **Patient communication and education** › **Patient adherence** › **Patient feedback**

Patient onboarding
- Automated patient forms (Auto-populating patient data)
- Interactive content (pre-engagement)
- Appointment scheduling (visit schedules, visit information)
- Patient payment support

Patient communication and education
- Multimedia content for patient education
- Gamified personalized progress meter
- Automated task lists
- Downloadable reports for various modules and health information

Patient adherence
- Reminders and notifications through application alerts
- Information on pharmacies and care coordinators (Home nursing)
- Adherence reports indicating patient compliance

Patient feedback
- Incorporating patient feedback through interactive surveys
- Ticket generation & query resolution mechanism (Chatbots, and other support channels)
- Redressal report showcasing patient satisfaction levels

Everest Group's evaluation criteria

Domain focus and coverage
- Does the start-up have significant experience in serving the patient engagement market and is it a patient engagement dedicated firm?
- Are the start-up's offerings in line with the current trends in the patient engagement industry?

Market buzz and history
- How is the investor confidence?
- What is the start-up's client mix? Does it have a diverse mix of clients in the life sciences industry?

Disruption and core competencies
- To what extent has the start-up created new/innovative solutions or software offerings in the patient engagement market?
- What is the impact of the solution provided?

Leadership and talent
- How large and geographically diverse is the workforce?
- How strong and relevant is the leadership cohort (in terms of patient engagement and from a technology experience standpoint)?

Patient engagement trailblazer - leaderboard

Six start-ups identified as trailblazers

BELONG.LIFE   Datacubed Health   Medable
YPrime   ripple science   THREAD

Trailblazer profile

	Domain focus and coverage	Market buzz and history	Disruption and core competencies	Leadership and talent	Overall
BELONG.LIFE	●	●	●	●	●
Datacubed Health	●	●	●	●	●
Medable	●	●	●	●	●
ripple	●	●	●	●	●
THREAD	●	●	●	●	●
YPrime	●	●	●	●	●

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Research calendar

Clinical Development Technology

Reports title	Release date
Life Sciences Decentralized Clinical Trial Platforms Provider Compendium 2024	February 2024
Optimizing Clinical Development RoI - Trends, Challenges, and Opportunities in Patient Recruitment	June 2024
The Promise of Generative AI in Clinical Development	July 2024
Life Sciences Electronic Data Capture (EDC) Products PEAK Matrix® Assessment 2024	September 2024
Patient Engagement Trailblazers in Clinical Development	September 2024
Transforming Trial Oversight with Unified Data and Analytics Solutions	Q3 2024
Life Sciences Clinical Trial Management System (CTMS) Products PEAK Matrix® Assessment 2024	Q3 2024
Life Sciences Clinical Data and Analytics (D&A) Platforms PEAK Matrix® Assessment 2024	Q3 2024
Life Sciences Electronic Data Capture (EDC) Products Provider Compendium 2024	Q4 2024
Life Sciences Clinical Trial Management System (CTMS) Products Provider Compendium 2024	Q4 2024
Life Sciences Clinical Data and Analytics (D&A) Platforms Provider Compendium 2024	Q4 2024
Clinical Development Technology – State of the Market	Q2 2025
Bridging the Gap: EHR-EDC Integration for Improved Healthcare Outcomes	Q2 2025
Tech Vendor Spotlight – Wearables and Remote Monitoring in Clinical Trials	Q2 2025
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