Start expecting more from eCOA/ePRO

Steve Rosenberg
Chief Executive Officer, uMotif

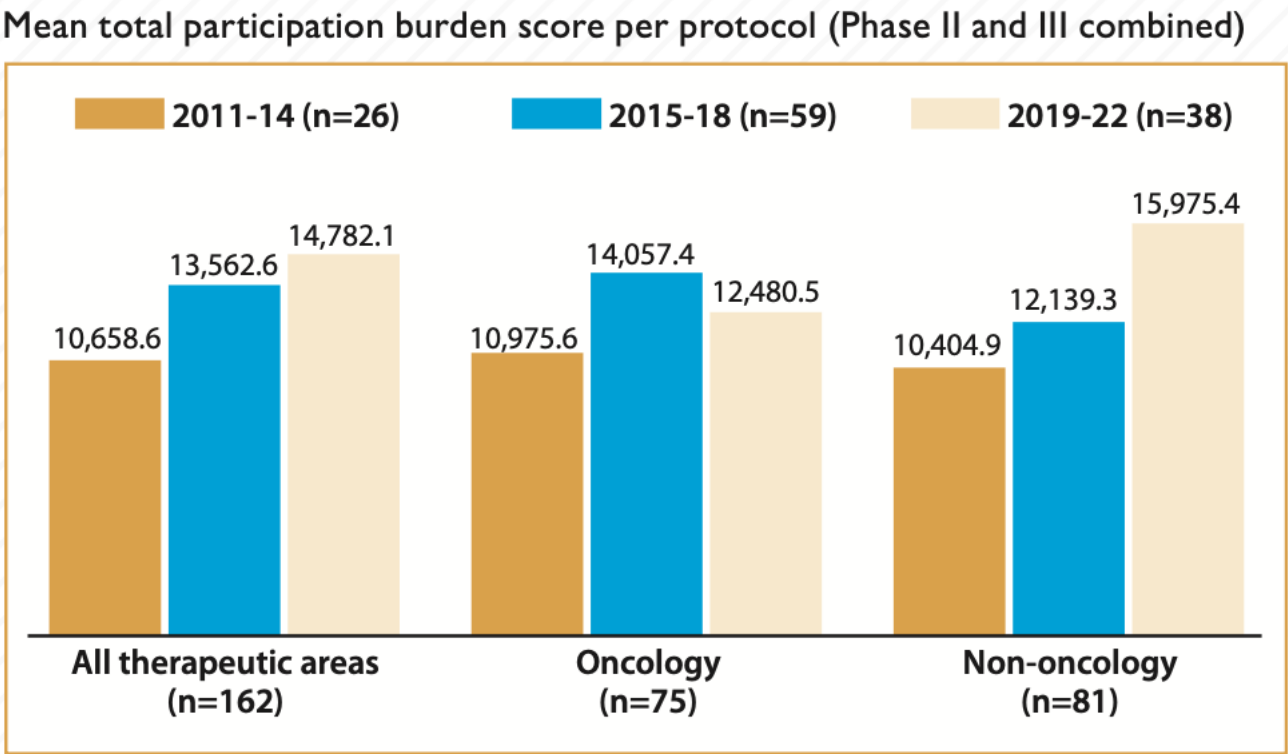# Market Trends

- Clinical trials are growing at 6.49% CAGR with a large increase in Phase 3 trials*

- eCOA/ePRO market growing from $1.8B in 2024 to $3.9B in 2029 -- 6.6% CAGR driven by therapeutic area demands, agency guidance, and secondary endpoints**

- Pharma is investing in site enablement and patient engagement to improve trial efficiency and accuracy of data collection

- Increasing influence of patient advocacy groups in trial design and investment in Chief Patient Officer roles to capture the voice of the patient

- Research site consolidation. CROs are expanding footprint and buying sites

- FDA drives capture of patient data through 21st Century Cures Act, regulators desire higher quality electronic data (less paper)
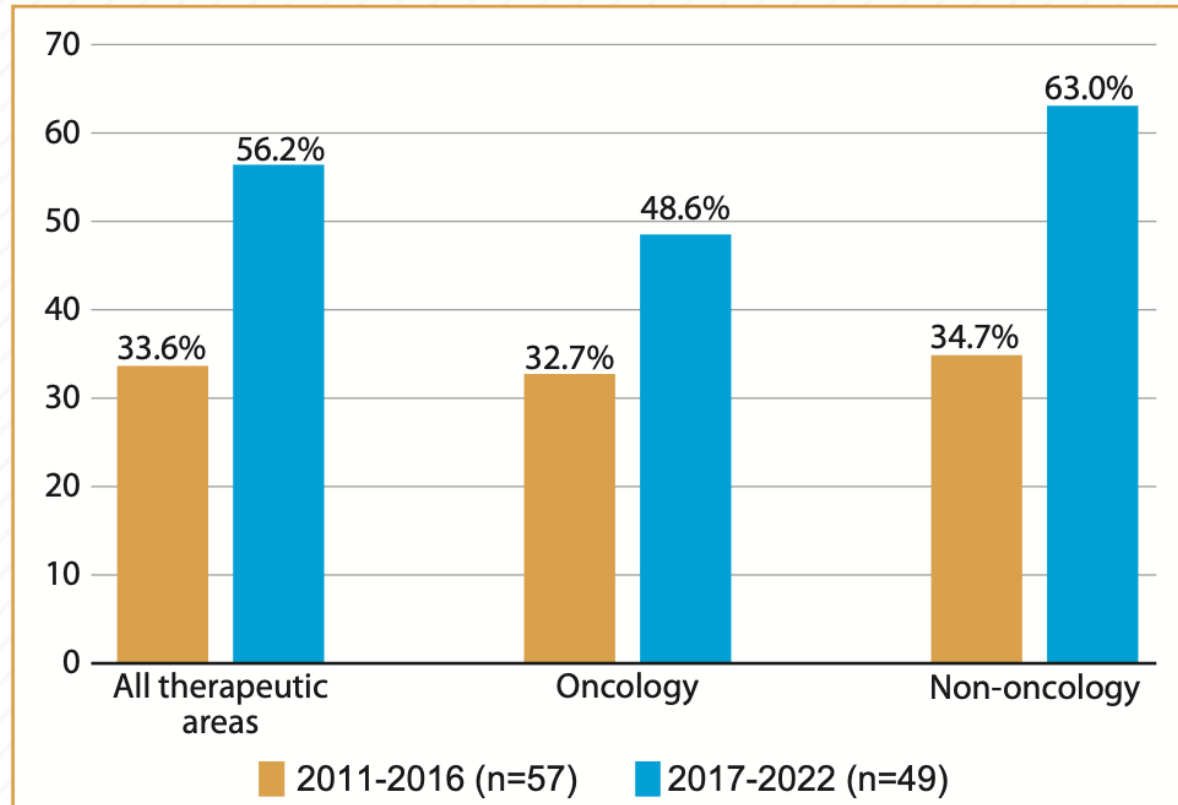
*Grand View Research
**MarketandMarkets, Feb 2024

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Patient Burden is Rising

Mean total participation burden score per protocol (Phase II and III combined)

- 2011-14 (n=26)
- 2015-18 (n=59)
- 2019-22 (n=38)

	2011-14	2015-18	2019-22
All therapeutic areas (n=162)	10,658.6	13,562.6	14,782.1
Oncology (n=75)	10,975.6	14,057.4	12,480.5
Non-oncology (n=81)	10,404.9	12,139.3	15,975.4

Source: Tufts Center for the Study of Drug Development

Tufts Impact Report, VOLUME 26, NUMBER 5 • September/October 2024

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Patient Choice is Driving Trial Dropouts

Percent of total premature participation terminations due to participant choice per Phase II and III protocol

	All therapeutic areas	Oncology	Non-oncology
2011-2016 (n=57)	33.6%	32.7%	34.7%
2017-2022 (n=49)	56.2%	48.6%	63.0%

Source: Tufts Center for the Study of Drug Development

Why did you stop your participation in the clinical research study?

Top Mentions:

- The side effects of the study drug (15%)

- The location of the study center (14%)

- There was poor communication with the study center (12%)

- The procedures during my study visits were too cumbersome (12%)

- There was no virtual option (12%)

Source: CISCRP, 2023 Perceptions and Insights Study

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Market Challenges

- 85% of clinical trials fail to recruit enough patients; 80% of trials are delayed due to recruitment problems*

- 70% of potential clinical trial participants live more than 2 hours away from a study center*

- Limited solutions to identify potential participants and directly engage with patients throughout the clinical trial process

- Increasingly complex protocols

- Patient and site burden is increasing

- Trial participant drop-out rates

- Low level of satisfaction with current solutions

- Lack of focus on the user experience
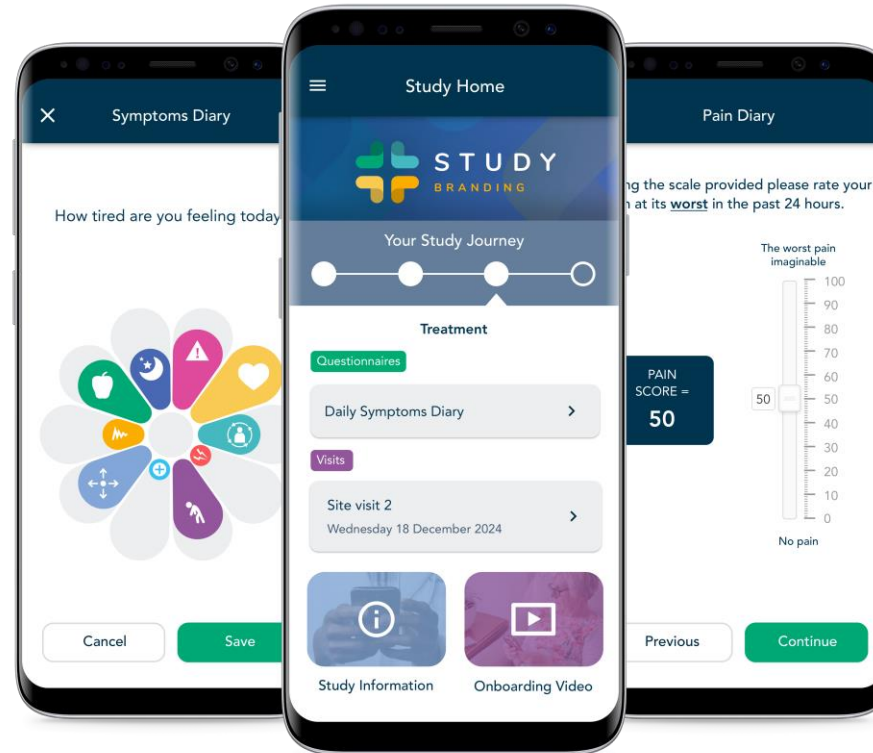
- Decreased adherence and data capture compliance

*Journal of Clinical and Translational Science, Sep 2023

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The only eCOA/ePRO truly focused on patient-centered research

- **Truly patient-centered** – Designed with the patient experience at its core to drive engagement and compliance

- **Flexible, high-touch design** – Configurable workflows adapt to each study's needs, ensuring >90% compliance in clinical *and* real-world studies

- **Personalized patient experience** – Dynamic content, reminders, and support tailored for every patient

- **All-in-one patient toolkit** – Integrated eConsent, education, adherence tracking, and transportation

- **Adaptive eCOA scheduling** – Intelligent scheduling and alerts keep patients on track without added burden

The most site-friendly platform focused on their needs

- **Less noise, more focus** – Removes unnecessary complexity, surfacing only the most critical information

- **Seamless SSO access** – A single sign-on (SSO) solution that consolidates all study systems

- **One-stop study hub** – Aggregates all essential tools, data, and workflows in a single, easy-to-navigate interface

- **Patient-first workflow** – Enables sites to spend less time on tech and more time focusing on patient care

- **Smart automation & alerts** – Adaptive workflows and dynamic notifications ensure sites never miss key actions

- **Frictionless experience** – Intuitive design and site-centric features reduce administrative burden and training

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uMotif Solutions Support the Journey for Patients, Sites, and Sponsors

	Site agrees to the study	Initial Screening (Patient 1st Contact)	Screening/ enrollment	Conduct
Patients			• Consent • ePRO	• ePRO • Engagement • Reminders • Study Information • Thank You's • Reconsent
Site	• Study Hub	• Study Hub	• Consent • Schedule of activities (visits, transportation etc.)	• Reconsent • Analytics/Alerts for compliance
Sponsor	• Analytics, oversight and alerts	• Analytics, oversight and alerts	• Analytics, oversight and alerts	• Analytics, oversight and alerts

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Thank you.

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