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Preface

We have been conducting voice of the customer research in the eClinical platform space for more than a decade, watching customers migrate from early piecemeal solutions offered by larger clinical CROs to early standards such as Oracle Clinical. Enter Medidata with its Rave EDC and Clinical Cloud platform, which won over customers with a pure-play eClinical platform that became the de-facto market leader. Since then, several other eClinical platform providers have entered the space with several making significant inroads to the point that they are are challenging the market leader.

Given that we had not undertaken a large, market survey of customer perceptions of the leading eClinical providers in several years, we felt the timing was right to take a fresh look. We were anxious to see if Medidata was still at the forefront of customer perceptions for market leadership, vendor performance and satisfaction, or if other strong market competitors, like Veeva, IQVIA or Covance, had overtaken the leader with their solutions.

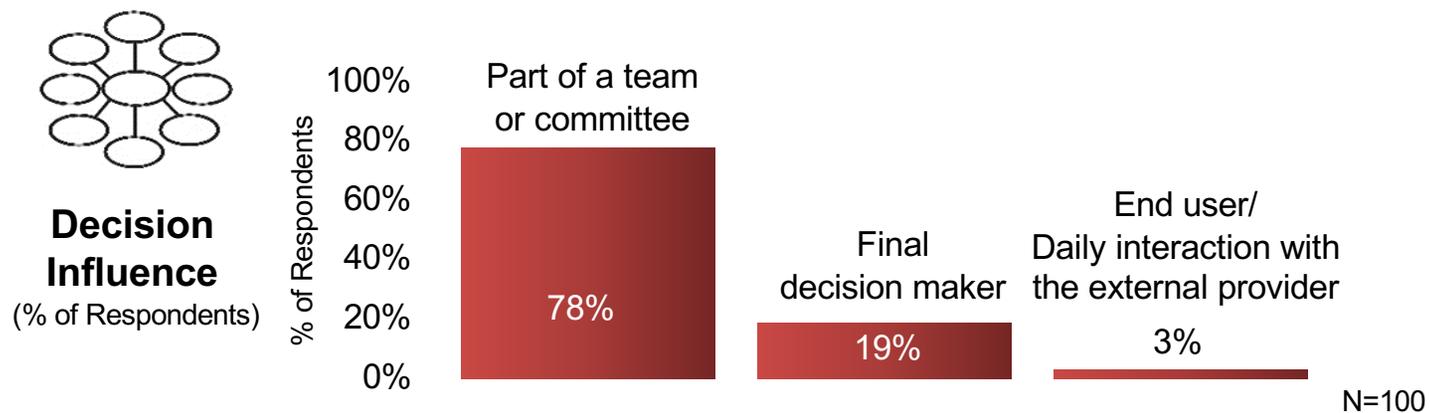
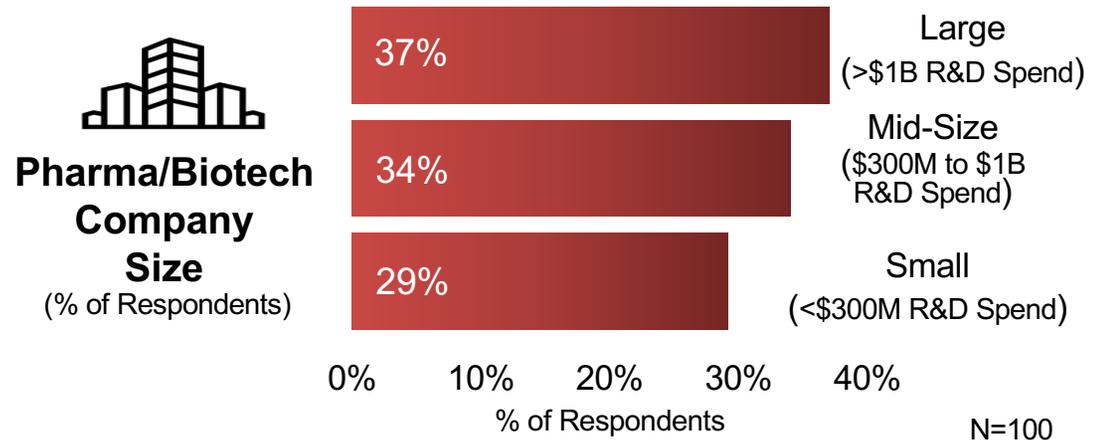
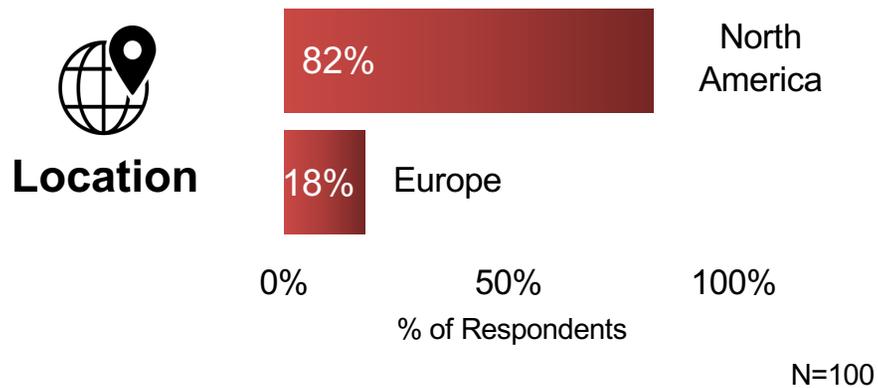
Upon digging into the data an interesting story emerges. The established market leader, while still firmly perceived to be as such, has a few clear “holes in its armor”. One vendor, in particular, is offering a platform solution that is resonating with customers through its intuitiveness and ease of use, to the point that we will be watching this market closely to see if a “passing of the market leadership torch” happens in the future.

The following report details customer perceptions of the leading eClinical platforms and providers across a multitude of vendor selection, performance and satisfaction metrics. We have analyzed the data from which the implications are clear. The Pharma industry is looking for eClinical platforms that guarantee the quality and integrity of its data while improving overall efficiency. The eClinical platform that delivers this to the market will be best positioned to succeed.

-Life Science Strategy Group, LLC

Respondent Demographics

- More than **70 unique biopharmaceutical companies** are represented by the research sample.



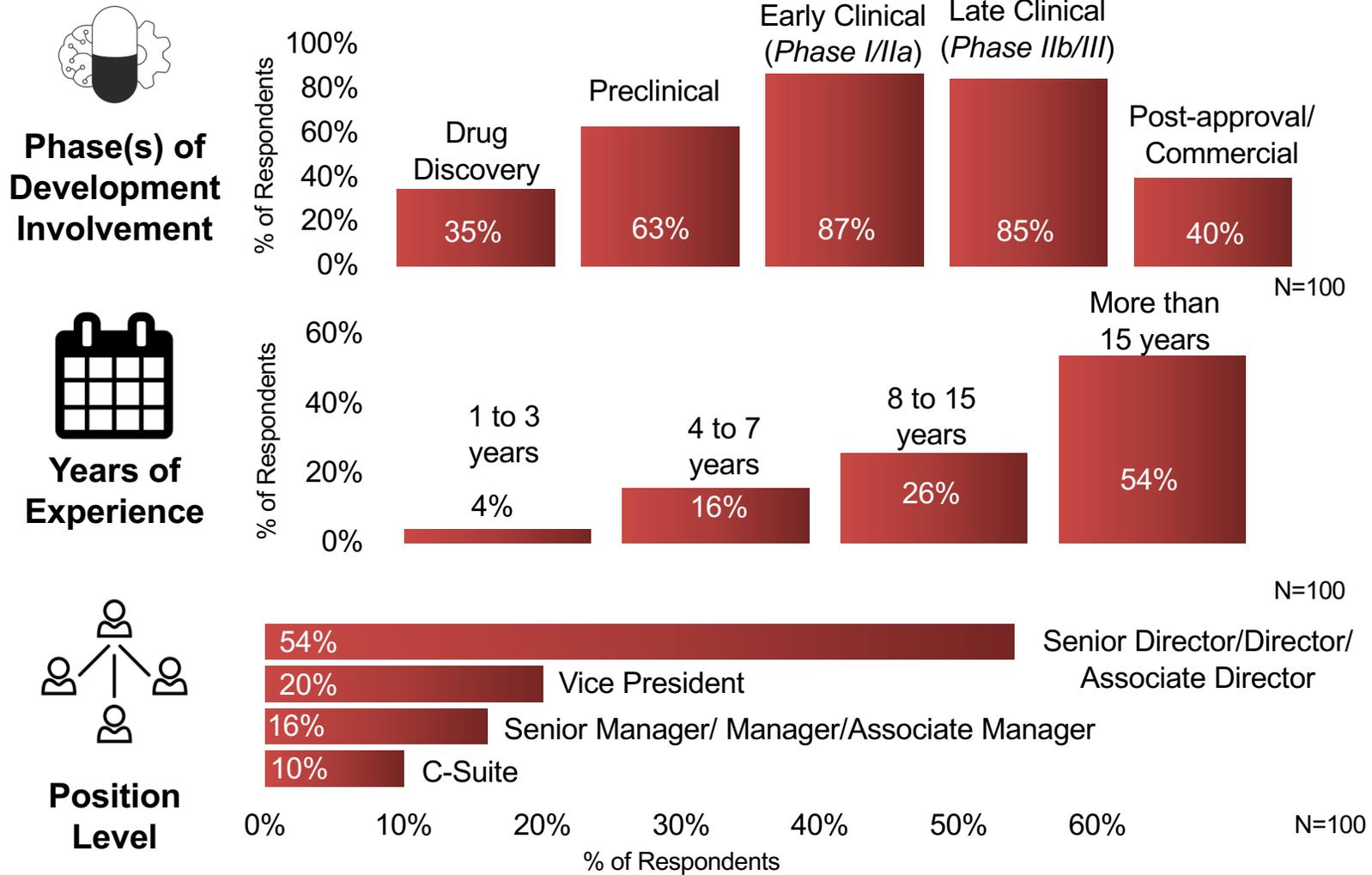
Q. Where are you located?

Q. Which BEST describes the type of company that you currently work for?

Q. What activities are part of your current role as it relates to the decision-making process for procuring and or selecting an external provider for an eClinical Platform solution?

Source: Life Science Strategy Group, LLC

Respondent Demographics



Q. How many years combined have you been in your current and related roles?

Q. Within what Phase(s) of drug development are you actively involved? Please select all that apply.

Q. Please indicate your position level or equivalent.

Source: Life Science Strategy Group, LLC

Respondent Demographics



Role in Clinical Development



Other* includes: Data manager, QA, Systems and processes, Quality

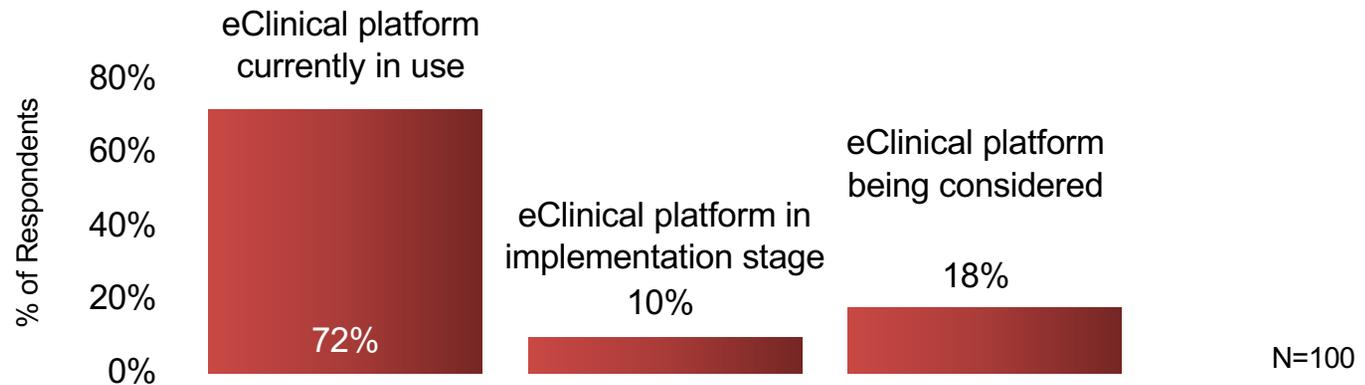
Q. What best describes your role in clinical development? Please select all that apply.

Source: Life Science Strategy Group, LLC

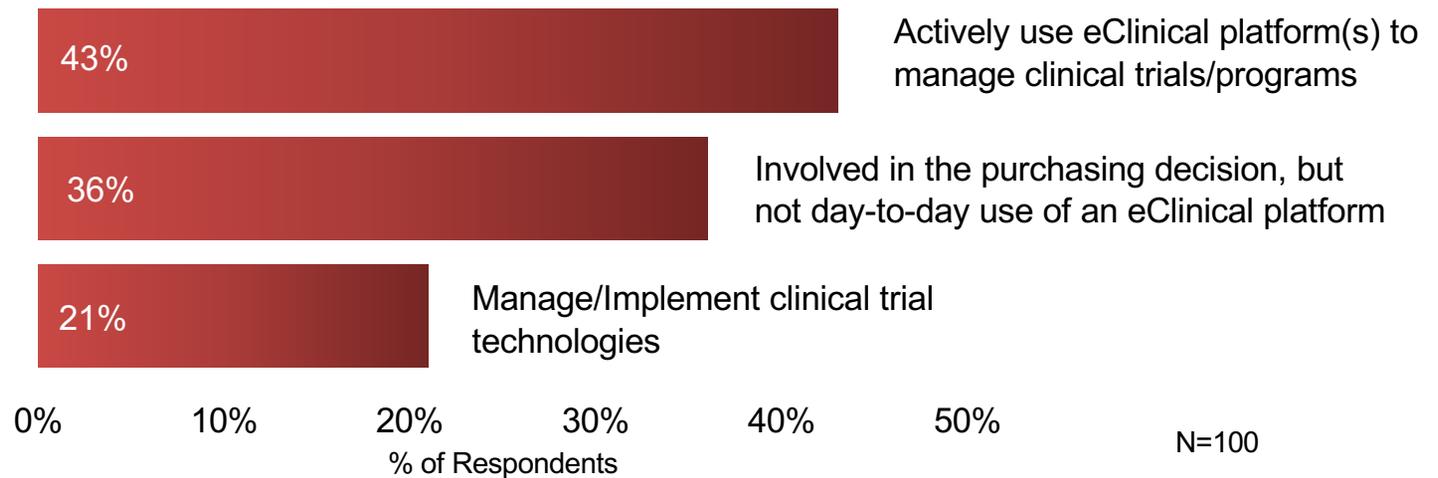
Respondent Demographics



Company Experience with eClinical Platforms



Interaction with eClinical Platform/Provider



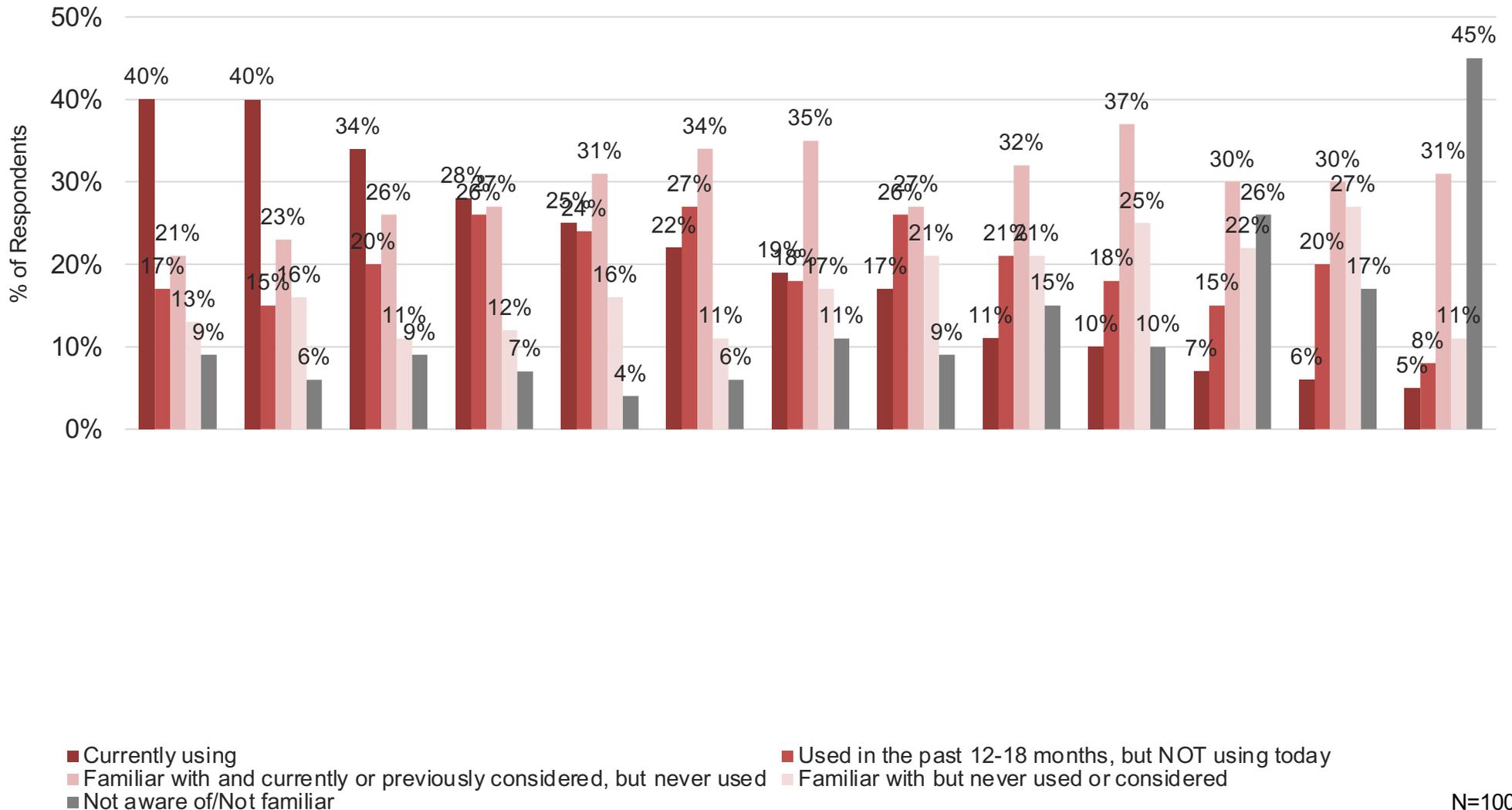
Q. What best describes your company's experience with eClinical platforms?

Q. What best describes your interaction with an eClinical platform/provider?

Source: Life Science Strategy Group, LLC

Respondent Demographics

Status with eClinical Platform Providers/Solutions



Q. What best describes your status with each of the following eClinical platform providers/solutions? Please indicate for each provider.

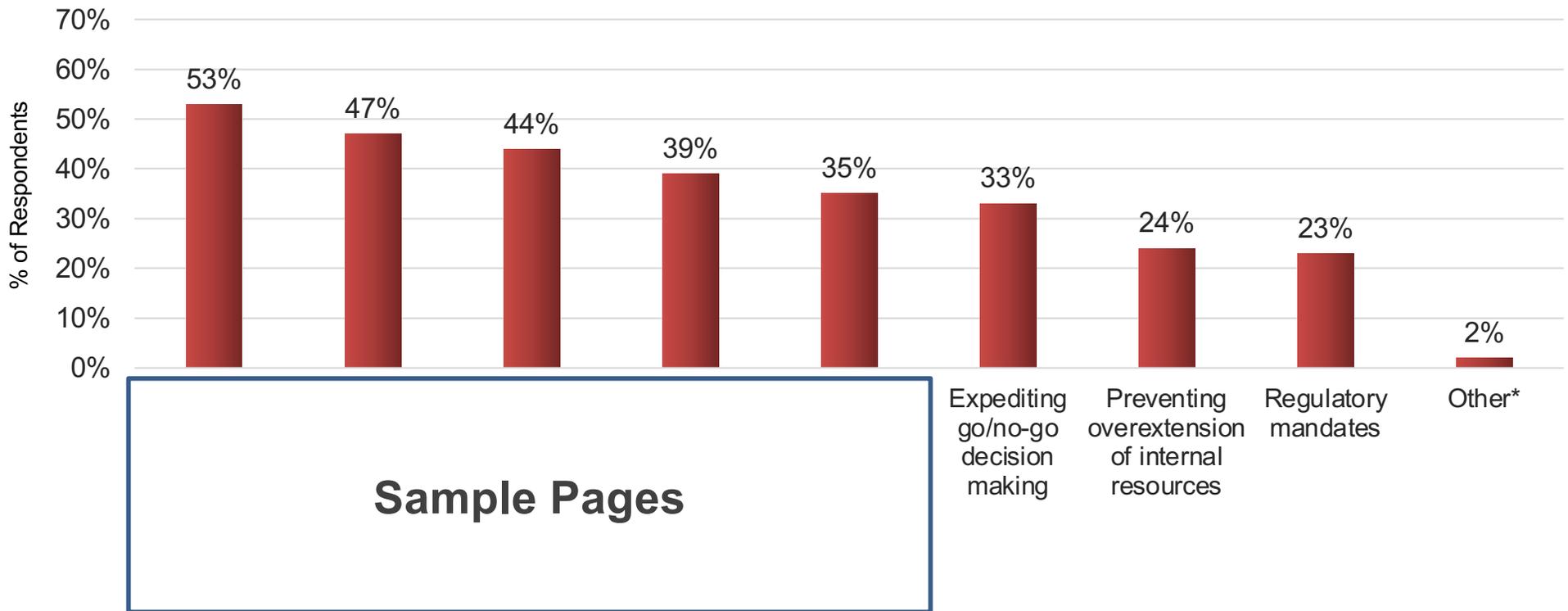
Source: Life Science Strategy Group, LLC

Companies/eClinical Platforms Included in the Analysis and Profiled

- Almac Clinical Technologies
- BioClinica Cloud
- Covance Xcellerate
- Emmes Advantage eClinical Suite
- IBM Clinical Development
- ICON Flex Advantage
- IQVIA Infosario
- Medidata Rave Clinical Cloud
- Oracle Platform and Clinical One
- Parexel Perceptive Cloud
- PPD CTMS
- PRA Health Prism eClinical Solution
- Veeva Vault Clinical

Top eClinical platforms increase users' productivity while providing a consistent user experience which allows faster, more efficient clinical trials. eClinical platforms are more attractive if they help companies reduce internal effort.

Top Benefits/Value Propositions Offered by an eClinical Platform



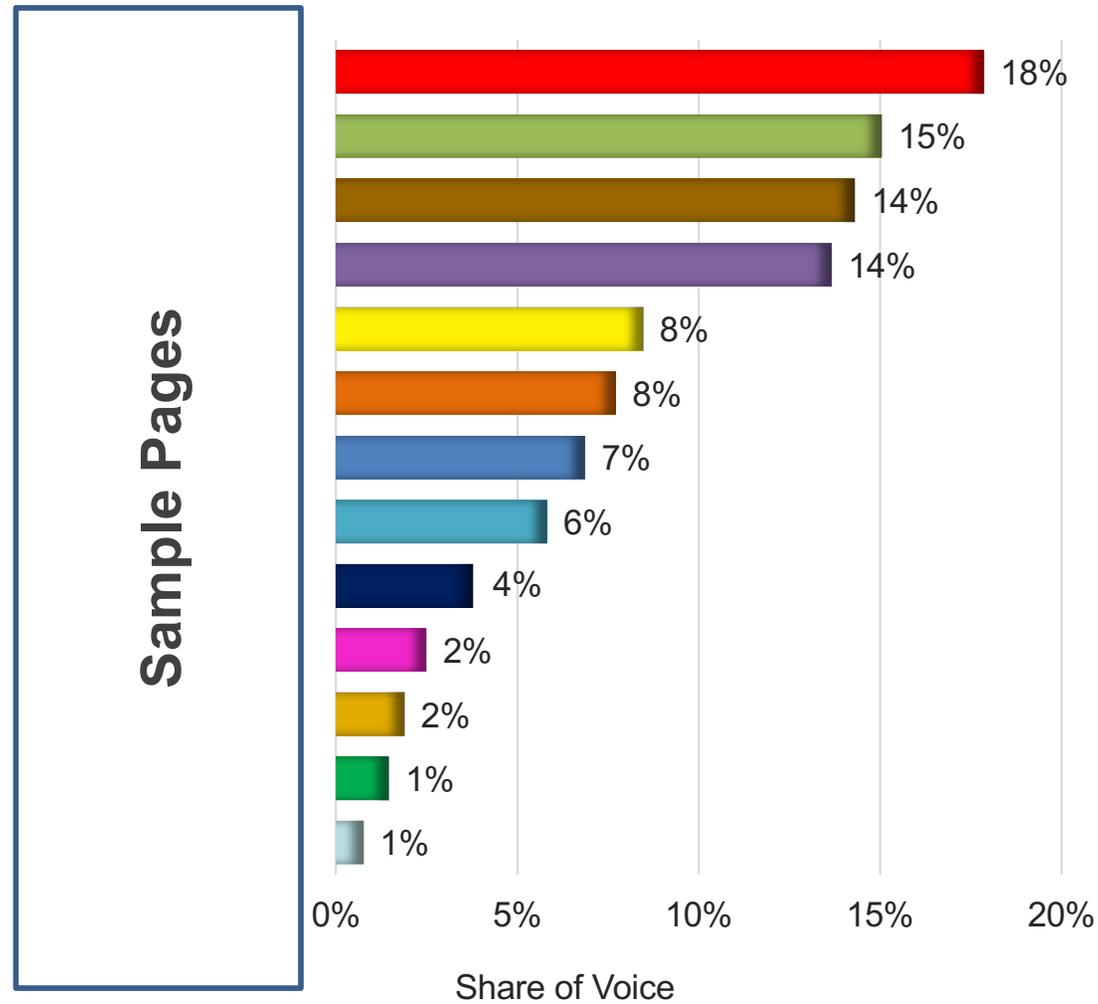
Other* includes: Real time insights for sponsor into study status, Ability to assure more timely database lock on study completion

Q. What are the top benefits or value propositions offered by an eClinical platform? Please select the top-3 options.

Source: Life Science Strategy Group, LLC

YYY share of voice leads other providers in clinical trial utilization, followed closely by A, B and C.

eClinical Platform Share of Voice



N=100

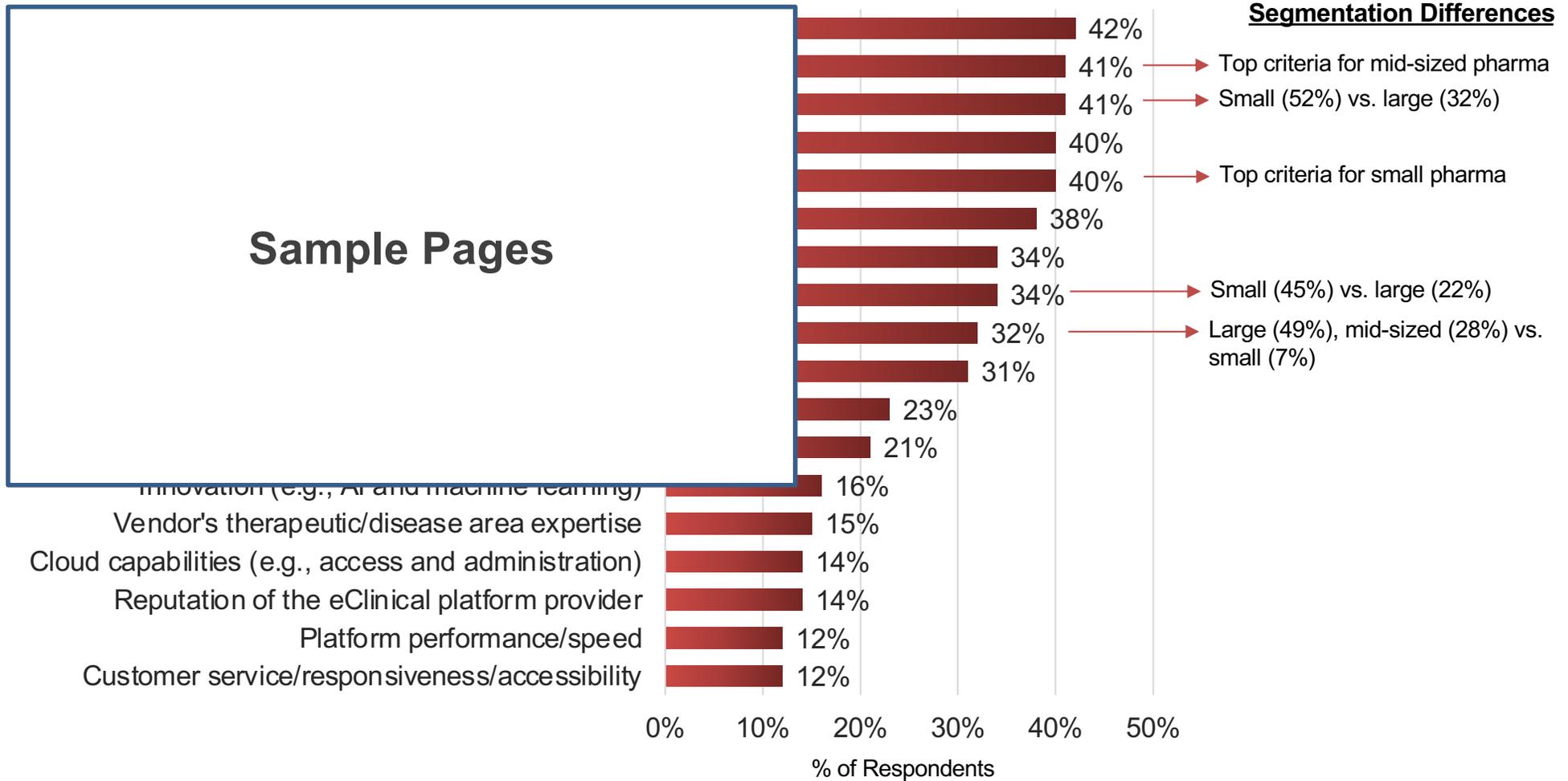
Note: Share of voice calculation involves percent utilization for all vendors from all respondents averaged across the full respondent sample.

Q. What percent of your/your company's clinical trials currently utilize each of the following eClinical platforms/providers as the primary solution?

Source: Life Science Strategy Group, LLC

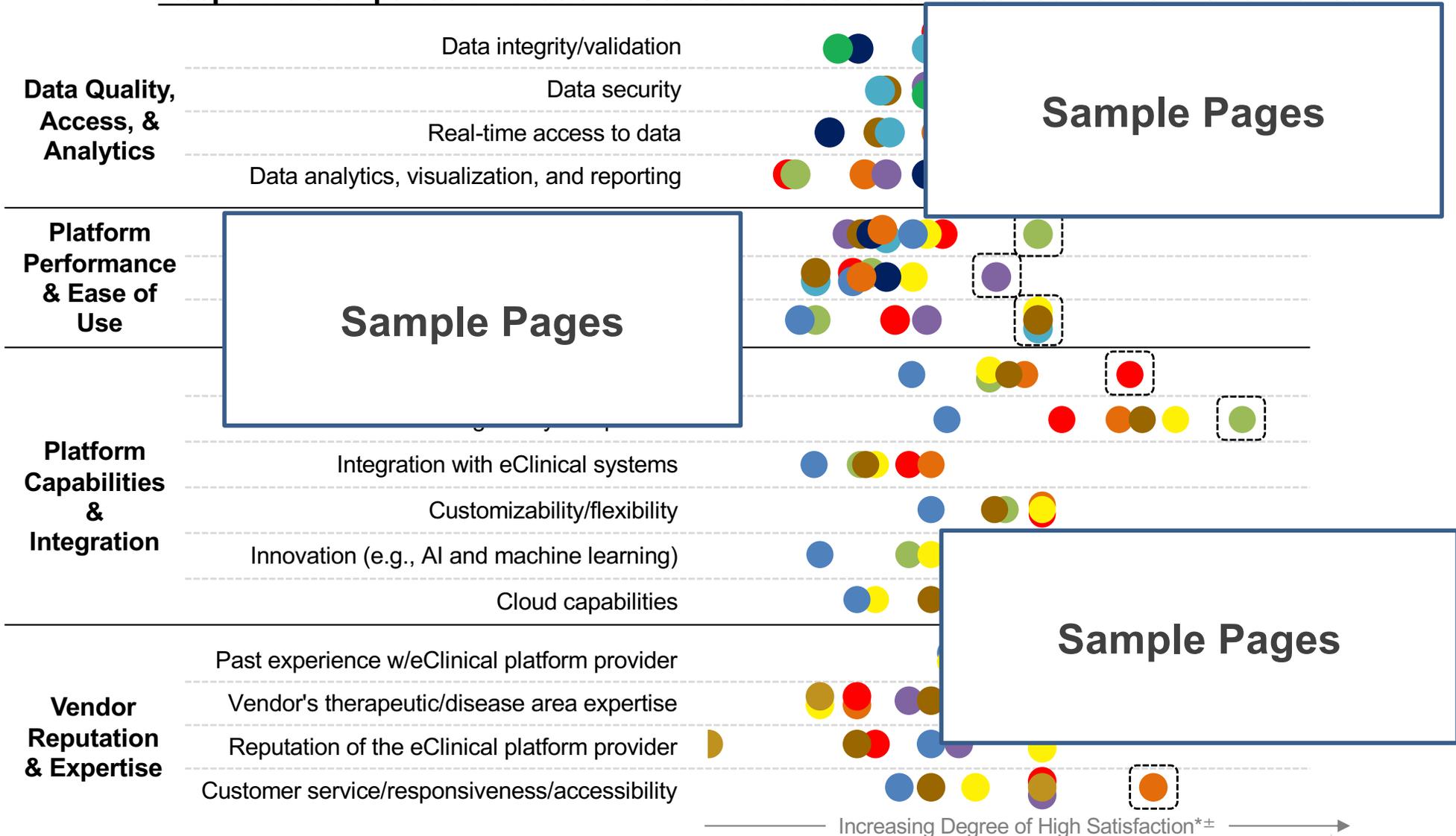
Top criteria evaluated when selecting an eClinical platform relate X, Y and Z.

Top Criteria Evaluated when Selecting an eClinical Platform



Respondents perceive Veeva Vault Clinical as the top platform across several attributes, including data security, ease of use, regulatory compliance, and cloud capabilities.

Deep Dive Comparison – Platform Selection Criteria vs Perceived Vendor Performance



Company Profile Company X

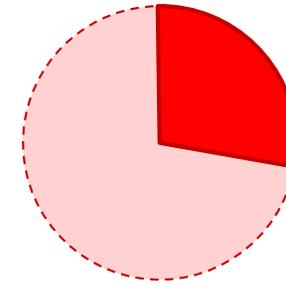
Platform Strengths

Ease of System Integration
Experienced
Brand Reputation
Reliable/Responsive
Comprehensive/Robust
Data Integrity
Ease of System Use
Consistent Experience
Customizable/Flexible
Quality
Value for the Cost
Innovative

Platform Weaknesses

Weak Breadth of Experience
Integration Issues
Poor Reporting/Visualization
Poor Customer Service
Expensive
Non-Customizable
Complex Implementation
No Weakness
Difficult to Use System
Compatibility Issue

Perception as Market Leader

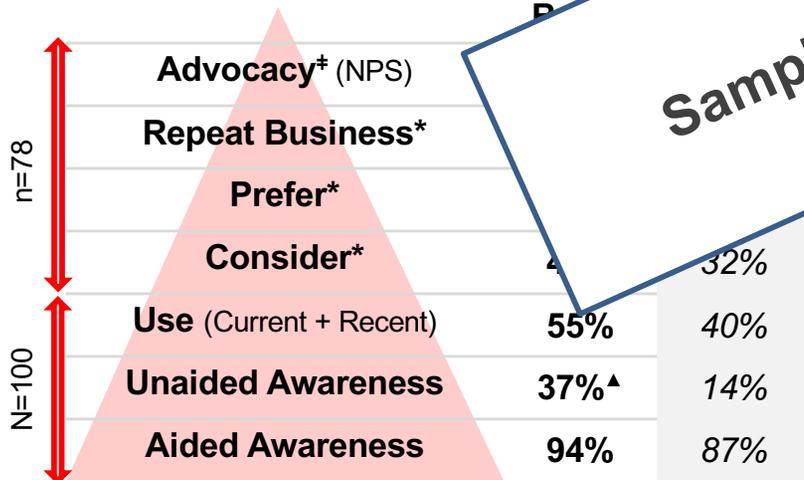


n=55†
ed platform

Share of Voice: 1

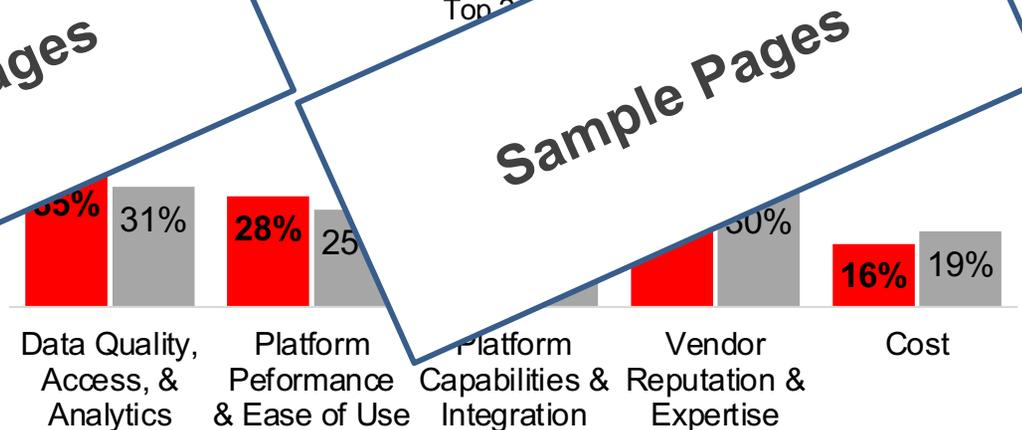
Brand Performance

% of Respondents



Performance on Important Platform Attributes

Top 2



† Net Promoter Score

*Top 2 Scores (% of respondents with a score of 7 and 6)

▲ Top performance among all platforms

*Cumulation of various attributes; sample sizes vary per attribute