

Case in Point: Forecast Uptake Study

Situation

A blockbuster drug's market research team was exploring and tracking penetration of their drug on an ongoing basis. This drug's growth rate appeared to be slowing, and tracking penetration was critical to assessing remaining opportunity and prioritizing areas of potential investment. It became clear that some of the penetration data on their tracking study was incorrect and potentially had been prior to the most recent report waves. These numbers, along with other inputs, were being used to estimate product usage in the current time period and also to forecast revenue into the future. If this input was incorrect, then the other inputs in the model were potentially incorrect too, because they had all been used together to validate the current sales figure.

This was viewed as disastrous by many inside the client organization, and the issue was raised to very senior levels. It called into question the entire product forecast and the company's understanding of remaining opportunity, which in turn drove key strategic and tactical decisions associated with the product. The company turned to G & S Research—who had performed a different demand study for them a year earlier—to field an updated forecast uptake study.

Objectives

▶ Get a true sense of where the brand stood in the market:

- ▶ Perceptions
- ▶ Current penetration by patient type
- ▶ Sizing of remaining opportunity by patient type

▶ Assess potential impact of new clinical data, from various studies, on a set of indications for the product

▶ Understand not just how much opportunity remained, but the nature of that opportunity:

- ▶ More first-line patient starts?
- ▶ Greater relapse usage?
- ▶ Improved dosing?
- ▶ Altered dosing schedule?
- ▶ Reimbursement changes?
- ▶ Other indications?
- ▶ Potential impact of new clinical data?

Methodology

A large-scale (215+ physicians), highly-detailed, quantitative Internet study was conducted to cover three key disease states. The most critical disease state was covered with all respondents; respondents were then randomized to one of two groups, each covering either the second or third disease state. In addition, respondents were randomly assigned to groups exposed to different new clinical data, to assess the likely differential impact of various studies on future use of the product.

Pre- and post-exposure share allocations and product usage variables (dosing, duration, etc.) were collected to further hone in on the impact of data exposure on product revenue drivers. Projected share was covered through two different techniques: stated share and patient charts. These share estimates were triangulated to arrive at a realistic share estimate. Data was collected on demographics, current and future prescribing, and attitudes/perceptions, enabling understanding of the drivers behind stated behavior, and key barriers to increased usage.

Outcomes

Two months after the project was authorized, we provided the client team with updated current and potential penetration numbers, a sense of the attitudes and perceptions underlying this usage, and an assessment of how much and what type of opportunity remained both by indication and by patient type, utilizing a summary scorecard for each of the indications.

As a result, the client has confidence in their understanding of where their product stands today and the potential in the future. This serves as a basis for finalizing their strategic and tactical decisions.

But the research didn't stop there as a great market research effort often doesn't end at first pass. Because of the richness of data, the client requested multiple add-on analyses for data cuts and mini reports to provide richer insights into the specifics of the findings.



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