

# Early-Stage Demand Research

## Global demand study for an early-stage oncology treatment in a high unmet need category

A global pharmaceutical company wanted to understand the market potential for a new therapy in a highly competitive oncology space.

Viscacia was asked to design and conduct an early-stage demand study in key global markets to support an updated forecast and a go/no-go decision regarding further clinical development.

**Demand study and updated forecast supported further clinical development for the asset.**

## Challenges



### Significant clinical uncertainty

- › Demonstrating clinical benefit vs SOC has been difficult, as illustrated by several recent clinical trial failures in Phase II and Phase III.



### Crowded market with several new competitors

- › Large number of potential entrants incorporating various new treatment modalities.
- › Timing and order of entry may limit market potential for later entrants without sufficient differentiation vs. established therapies.



### Strategic importance

- › Category with a large patient population and high unmet need in second and later lines of treatment.

# Approach



## Product Conjoint Design

For eligible patients, investigating sensitivity of results to variations in clinical performance for new products.



## Primary Market Research

N=400 online interviews conducted across key geographies in the US, EU, and Japan.

N=20 follow-up qualitative interviews to deep-dive into the why's underlying oncologists' prescribing decisions.



## Forecast Update

Incorporated demand study outcomes to update the revenue projections for the treatment under consideration.



## Post-Survey Calibration

Ensured shares accurately reflected current market dynamics by adjusting for HCP overstatement in anticipated prescribing.



## Multiple Market Scenarios

Reflecting assumptions regarding timing and order of entry.

# Outcomes

## End Deliverables

- > Global PowerPoint report highlighting key analyses and insights for each geography.
- > Excel-based market simulator allowed the client to conduct sensitivity analyses, estimate product attribute importance scores, and investigate "what-if" scenarios for key patient segments and market scenarios.
- > Updated global forecast.

## Key Highlights

- > Simultaneous management of the demand study and forecast model ensured synergy, enhancing study completeness and facilitating seamless integration of outcomes into the forecast framework.
- > Enabled timely forecast updates to integrate into the long-range plan, driving pivotal corporate strategy decisions.

## Impact

- > Facilitated the leadership team in presenting a compelling case for continuing clinical development to executives and investors.
- > Empowered leadership to assess returns and strategically choose between independent pursuit or strategic partnership for the asset.