



Global Patient Case Demand Study

Global demand study for a rare type of hematological cancer with complex treatment dynamics

A clinical biopharmaceutical company sought to understand the market potential of a novel, late-stage pipeline drug candidate for a rare form of blood cancer.

Viscadia was tasked with designing and conducting an in-depth demand study in key global markets to gain insights into the current market landscape and future developments, and to inform the forecast model based on the study's findings.

Assisted the client in evaluating the product's potential across various patient segments and equipped the forecast for a successful launch planning

Challenges



Product's positioning amidst evolving market dynamics

- Current treatment options comprise a mix of newly launched branded targeted therapies and generic.
- A recently approved branded therapy for frontline use is disrupting the treatment paradigm.



Complex patient segmentation based on eligibility and prior treatment history

- Patient segmentation, including prior treatment history, vital for identifying the product's potential versus competitors.
- Variations in the potential product label also crucial in identifying the target patient opportunity.



Accelerated timeline to meet cross functional needs

- An updated forecast incorporating the demand study findings was necessary to drive operational and financial decisions.
- A new round of investments depended on the updated forecast metrics.



Approach



Patient case study

Realistic patient cases incorporating the key patient characteristics influencing treatment decisions served as context for the research.

Patient profiles included key characteristics such as prior therapy received and their response, making them more realistic.

Patient simulation allowed for estimation of shares at both segment and sub-segment levels within each line of therapy.



Global Quantitative Survey

Online surveys were conducted globally across major geographies with over 250 physicians combined across key specialties and practice settings.



Multiple product label scenarios

Respondents' treatment choices were evaluated across multiple product scenarios to assess their receptivity towards different potential product labels.



Post-Survey Calibration

A robust share calibration methodology was adopted to triangulate physician-stated responses with real-world dynamics and to adjust for HCP overstatement in anticipated prescribing.



Competitor impact

Assessed awareness of the recent front-line approval of a key competitor and its potential impact on physicians' current treatment choice selection.

Outcomes

End Deliverables

- › Global study readout with key insights around prescribing behavior and analyses around product potential for each geography.
- › Patient case simulator to investigate preference share estimates across different patient segments.
- › Updated forecasts and scenarios for each geography based on the outputs from the demand study.

Key Highlights

- › Physicians preferred the product for later rather than earlier lines of therapy, due to the lack of direct comparison trials with existing treatment options.
- › US physicians prioritized the product's efficacy over safety, while EU physicians expressed greater concern about safety, leading to lower overall prescribing rates in the EU compared to the US.

Impact

- › Insights from the demand study and the forecast updates supported successful launch planning and played a key role in securing additional investments prior to launch.
- › Helped identify product characteristics that differentiated the new product relative to competitors.