

## Case Study

NEW PRODUCT OPPORTUNITY

*How does a fledgling European biotechnology company break into the hypertension drug market?*

### *Situation*

A fledgling European biotechnology company achieved favorable Phase I clinical results for a drug with a novel mechanism of action to treat hypertension. The client turned to Decision Resources Consulting to evaluate the hypertension market in the United States and Europe, and to develop a positioning strategy and forecast for the drug based on three different scenarios reflecting levels of success.

### *Challenge*

*The key challenges for the Decision Resources consulting team included:*

1. Identifying what role this new agent could have in the very crowded hypertension market and determine what its value proposition might be to drive prescriptions and achieve market share.
2. Evaluating and projecting which patient/market segments represented the greatest potential for success for the compound.
3. Developing 10 year forecasts for each market segment using assumptions that mapped to three different levels of success: worst, most likely, and best case scenarios.

### *Approach*

*Utilizing its market proven methods, the Decision Resources team delivered thorough, rapid, and defensible results:*

**Step 1** The team leveraged Decision Resources' "whole company" extensive therapeutic experience in the hypertension market. It accessed the underlying analyses and involved the cardiovascular team behind Pharmacor, DecisionBase, and Spectrum reports to quickly put together a high-level overview of the market to develop the base year market forecasts and develop interview and focus group moderator guides for primary research with a panel of thought-leading and high-prescribing physicians.

Decision Resources

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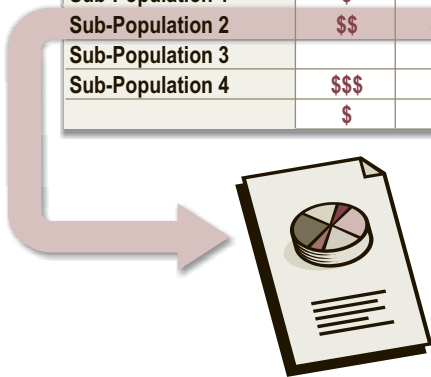
**Step 2** Decision Resources Consulting conducted over 50 in-depth interviews in the United States and Europe with primary care physicians, cardiologists, and thought leaders to gain further insight into hypertension referral and treatment patterns, and to test the product profile. A main objective of the interviews was identifying the key drivers that influence physicians' selection of one class of agents over another and identifying which patient populations (from a clinical as well as a market perspective) would most benefit from this product. Additional questions explored the minimum requirements for success and gauged physician's likelihood to prescribe this novel product over existing therapies and potential emerging therapies.

**Step 3** The primary interviews were further enhanced with two online focus groups (U.S. and Europe) that were used to develop consensus on parts of the initial findings that had a wide variations in responses. The focus groups also served to more accurately quantify the key assumptions that would lead to the market forecasts.

**Step 4** Working with Decision Resources' epidemiology staff, "bottoms up" patient level product forecasts were developed. For each patient population and under each scenario we detailed the probability of success and revenue implications. Assumptions for these scenarios were also documented and delivered as part of a final presentation outlining the indication and market as a whole, key interview insights, and the final forecast deliverable.

Specific segment forecasts led to clinical development recommendations and market positioning strategy

	2000	2005	2010
Overall Hypertension	\$\$\$	\$\$\$\$	\$\$\$\$\$
Sub-Population 1	\$	\$\$	\$\$\$
Sub-Population 2	\$\$	\$\$\$	\$\$\$\$
Sub-Population 3		\$	\$
Sub-Population 4	\$\$\$	\$\$	\$\$\$
	\$	\$	\$\$



## Outcome

Using the strong qualitative and quantitative analysis and strategic recommendations provided by Decision Resources Consulting, the client was able to confidently prioritize their clinical development program based upon the market segment forecasts and develop a market positioning strategy for its new product capitalizing on the compound's unique value proposition.

## The Decision Resources Difference

Working closely with its cardiology team and panel of physician thought leaders, Decision Resources Consulting was able to analyze the hypertension market and find an attractive set of messages and claims to drive a unique and sustainable product strategy for the client.