CASE STUDY: TRACKER / CONGRESS

Biosimilars

Who?	Top 50 Pharmaceutical
What?	Long Term Tracker
Why?	The relatively stable Somastatin Analogue market is migrating into a more dynamic space, with new biosimilar entrants shaking up the market for all players concerned. In order for our client to stay competitive, they needed to understand which companies were developing biosimilars, hybrids or generics versions of their product, the likelihood of launch, time lines, regulatory routes, clinical profile, trial details and partnering potential
Where?	EU, Korea, China, India and USA
When?	Q2 2012 – Q4 2013
How?	Dig Worldwide contacted target companies, conducted face-to-face meetings (Korea) and attended the CPhI congress to answer Key Competitive Questions. Dig contacted over 85 internal sources across the globe as well as external sources relevant to the area. This translated into an excess of 35 substantive interviews
Result?	Once the intelligence was collected, the companies were broken down in high, medium and low threat and monitored accordingly. Dig provides the client with quarterly updates on competitor milestones

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CASE STUDY: TRACKER

Delivery Devices

Who?	Top 50 Pharmaceutical
What?	New entrants along with novel transdermal delivery devices were soon to be entering the Women's Health marketplace. A number of potential competitors had failed to bring their product to the market due to the many manufacturing challenges. As such, our client needed to understand which companies had the best chance of success and how they would bring the product to the market
Why?	Our client was concerned about these potential entrants utilising various forms of transdermal delivery to differentiate their products which would threaten our client's own patch franchise
Where?	EU, India, APAC and USA
When?	Q1 2013
How?	Dig focused its primary interviews across a wide range of sources from regulators, API suppliers, wholesalers, regulatory agencies, industry associations, specialists, nurses, target company, marketing service suppliers and patient associations. Key Questions included timelines to launch, regulatory approaches, how they overcame manufacturing hurdles, where they would launch and differences to what was already on the market
Result?	Dig was able to uncover which competitors would progress through to launch and those that were destined to fail. For those that were able to market the product, Dig provided launch timelines in 10 countries down to the month, SWOT analysis, regulatory approaches and marketing strategies which are updated on a quarterly basis

Note: Dig Worldwide procured samples of several competitors' transdermal patches sourced from APAC

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CASE STUDY: TRACKER

Manufacturing

Who?	Top 50 Pharmaceutical
What?	Determination of the manufacturing methodology, capacity and future expansion plans of two new entrants into the Severe Pain market place
Why?	Having an accurate assessment of the manufacturing capability and capacity of two difficult to manufacture products would allow our client to accurately assess volume and pricing assumptions, their impact on future sales forecasts as well as the likely launch date based on manufacturing readiness
Where?	USA and Japan
When?	Q1 2012 – Q4 2013
How?	Key sources working for the target companies as well as equipment/consumable suppliers, environmental agencies and engineering consultancies were all contacted over an 20 month period. These were initially found using Dig's proprietary Source Enrichment capability
Result?	Detailed current and future facility plans were obtained, equipment models and performance specifications were gathered, engineering qualification was tracked from installation to GMP performance qualification. Future expansion plans and associated timelines were determined. Samples of raw material were also obtained from a specialist supplier in Japan which allowed our client to benchmark their own product attributes against a future competitor prior to launch

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CASE STUDY: LANDSCAPE/ CONGRESS

Cardiovascular

Who?	Top 20 Pharmaceutical
What?	Ad-hoc retainer tracking three competitors in the anticoagulation space
Why?	Our clients' principle competitors in the rapidly evolving anticoagulation market place were creating waves in terms of clinically superior data and marketing initiatives which required constant tracking in order to counter accordingly
Where?	Europe and the USA
When?	Q2 2012 – Q3 2013
How?	Dig approached sources within the competitor companies on both sides of the Atlantic, assisted by Dig's bespoke Source Enrichment tool. Dig interviewed clinical, regulatory as well as senior marketing and sales employees of both companies augmented by advisory board members and principal investigators
Result?	The regulatory and pre-marketing progress of the targets were successfully monitored on an ad-hoc basis. This resulted in real-time awareness and insights into competitor activity across the majority of the EU countries and the USA

Note: Dig Worldwide has attended the following relevant Congresses in 2012/3: ESC

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CASE STUDY: LANDSCAPE/ CONGRESS

Oncology

Who?	Top 50 Pharmaceutical
What?	Dig Worldwide has worked across a number of areas including: Liver, Neuroendocrine, Male (Prostate), Female (Breast/Ovarian) and Bladder cancers
Why?	The projects consisted of understanding competitor launch timelines, clinical trial details, entry strategies (including South East Asia), pricing points, key messaging and determining threat levels
Where?	Global
When?	Various projects have been ongoing since Q4 2011
How?	In all cases, Dig Worldwide attended a number of congresses, engaged with relevant sources such as KOLs, principal investigators and the target companies. Efforts were focused on the competitors activities in the various Oncologic sectors which provided the clients with competitor insights
Result?	Dig Worldwide successfully contributed to brand plans, evolving competitor landscapes and provided the clients with an up-to-date understanding of the clinical and strategic particulars of the competitor sets

Note: Dig Worldwide has attended the following Congresses in 2012/13: ASCO, EAU, ENETS, ENEA & ESMO

CASE STUDY: SNAPSHOT

Intelligence Gathering In China

Who?	Top 10 Pharmaceutical
What?	Our client wanted to know the size and structure of four competitors' China based field forces prior to launching its own product for two major CV indications
Why?	Share-of-voice is a key factor for success in China. Our client needed to ensure that the size of its own field force could compete against its principal competitors
Where?	Peoples Republic of China
When?	Q1 2013 – Q2 2013
How?	Our network approached ~ 100 sources across 16 provinces in China, encompassing all of the major urban centres. We interviewed primarily District and Regional Sales Managers. Because of the variability of intelligence gathered in China, we also crossed checked the data with knowledgeable sources located at the target companies Chinese HQs as well as the EU/US HQ
Result?	We successfully mapped the field forces across all target organisations as well as gathered intelligence on the number of representatives promoting other non-CV therapy areas. Dig established details of the management structure, number of Medical Scientific Liaison employees as well as future hiring plans (which were linked to the promotion of new indications)

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CASE STUDY: SNAPSHOT

Raw Material (API) Identification

Who?	Top 50 Pharmaceutical
What?	Active Pharmaceutical Identification
Why?	Dig was engaged to uncover the identify and location of an API provider or providers who were supplying our clients competitors. The source of API was a complete unknown and once identified, this would allow for tracking of the API supply
Where?	EU, The Americas, South East Asia, India and China
When?	Q2 2012
How?	Dig generated a short list of potential suppliers which were located across the globe. We then preformed an initial intelligence gathering sweep of over 20 suppliers to determine if they did or did not supply the competitor. Finally, Dig defined a list of four potentials to perform a more in-depth analysis and elicit intelligence from
Result?	Dig uncovered the identify of the primary supplier as well as two secondary API suppliers for two future competitors. In addition, we uncovered and subsequently tracked the planned volumes of API that were intended to be shipped over a period of 12 months. This allowed our client to use import statistics to cross check the volumes of API being shipped from APAC and make an assessment of how much competing product would sell

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CASE STUDY: LANDSCAPE

COGs Benchmarking

Who?	Top 50 Pharmaceutical
What?	Benchmarking our clients COGs across two therapeutic areas against peers as well as direct competitors
Why?	New management came into play and wanted to understand if further efficiencies could be achieved with regards to cost of goods
Where?	UK, Belgium, France and the USA
When?	Q1 2013 – Q2 2013
How?	Internal sources (or recent past employees) specific to the target companies were contacted. These were found using Dig's proprietary Source Enrichment capability. COG numbers were derived as a "top-down" ratio of the average selling price of a standardised unit. Using ratios usually reflects operational reality verses bottom-up and is also a legal and ethical means of deriving the numbers
Result?	In one therapeutic area, our client was the most efficient producer and in another, it came as substantive shock that it cost significantly more to produce an equivalent unit than its peer. Actions to correct this anomaly are being discussed

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CASE STUDY: LANDSCAPE

Toxins

Who?	Top 50 Pharmaceutical
What?	An in-depth investigation into the life-cycle-management initiatives of nine companies for cosmetic and therapeutic indications of botulinum toxin
Why?	To provide clear insight into the competitors movements within their toxin franchise and understand if they are developing new formulations/delivery devices
Where?	EU, US, China, Korea, Australia
When?	Q3 2013 – Q4 2013
How?	Internal sources (or recent past employees) specific to the target companies were identified alongside peripheral sources which included clinical experts and opinion leaders as well as logistic, equipment and IT suppliers. These were found using Dig's proprietary Source Enrichment capability and were interviewed either in person (as in Korea) or via the telephone. During the course of the assignment, 157 sources were engaged which translated into 42 substantive interviews
Result?	A comparative threat matrix to our client was developed which included anticipated next generation product profiles, planned regulatory filing and regional launch objectives. Technology transfer initiatives, research collaboration agreements, clinical difficulties as well as financial health issues were identified and described during the course of the assignment. The results of this project were presented to the brand team and were used to adjust future sales forecasts and refine marketing plans

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