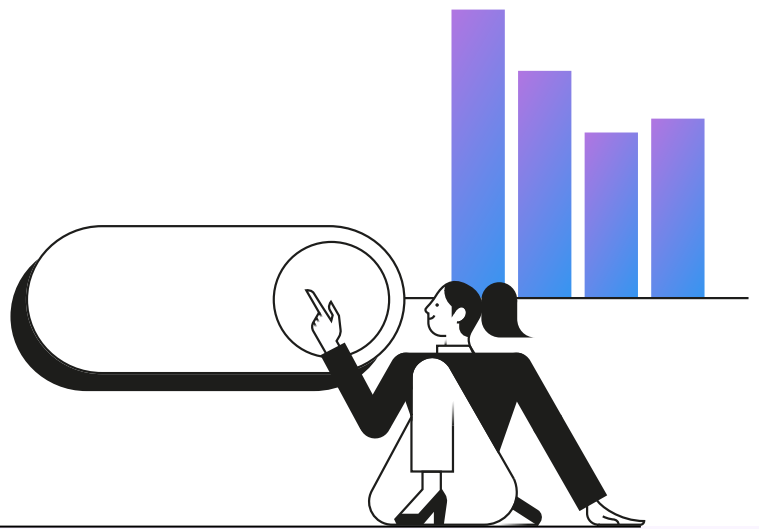


Optimizing European Market Access

Case Study | Market Access

Optimizing European Market Access for an Oncology Therapy Using Advanced Epidemiology



Background

A pharmaceutical company sought to optimize the European market performance of its oncology therapy (antineoplastic monoclonal antibody). While clinical value was established, the organization needed a clearer, data driven view of the eligible patient population, current market performance, and access challenges across Europe.

The Challenge

The client required a robust assessment to answer key commercial and market access questions, including:

- How large is the eligible oncology patient population for antineoplastic monoclonal antibody in Europe?
- How does current performance compare with true market potential?
- What barriers are limiting adoption and access at a country level?

Accurate epidemiology, validated assumptions, and actionable insights were critical to inform strategic decision making.

The Solution

Clarivate's Epidemiology and consulting experts delivered an integrated market opportunity assessment combining proprietary data, advanced modelling, and stakeholder insight.

Key components included:

- **Eligible patient population estimation:** Use of country specific cancer incidence and stage specific incidence survival prevalence models, enhanced with real world data adjustments.
- **Opportunity mapping and hypothesis generation:** Analysis of Clarivate proprietary datasets and desk research to identify adoption and access barriers across markets.
- **Hypothesis validation:** In depth interviews with clinicians and stakeholders to assess real world treatment dynamics and performance of the antineoplastic monoclonal antibody.
- **Strategic recommendations:** Evidence based solutions to address access challenges and unlock market potential.

The Results

Clarivate provided a clear, evidence-based view of the European market opportunity for antineoplastic monoclonal antibody, enabling the client to align strategy with realistic growth potential.

Outcomes included:



Robust estimates of the oncology patient population eligible for antineoplastic monoclonal antibody



Clear identification of performance gaps across European markets



Validated access and adoption challenges grounded in clinician insight



Actionable, market specific recommendations to support improved uptake and commercial impact