

Case Study: ATU Study in Molecular Diagnostics



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Table of Contents



CONTENTS

1	Outcome of Study (Slide 3)
2	Study Approach (Slides 4 & 5)
3	Sample Analysis (Slides 7-9)

Outcome of Our Study: Product X's Post-Project History



1. **Product X**, launched as an add-on to an existing diagnostic device marketed by **Brand X**.
2. The **Product X** launch, supported by our market research, was the solid foundation for a very successful revenue stream for **Brand X**.
3. Annual revenues for the molecular diagnostic unit of **Brand X** (including **Product X**) doubled from roughly \$150 million in **Product X's** launch year to \$300 million within a few years, when the arrival of the COVID-19 pandemic expanded the need for testing.*

Improvements in Product X Performance Across the Waves of ATU Research

Cost as the #1 limitation for **Product X** decreased from 30.4% (highest of all limitations) of respondents in Wave 1 to 15.0% in Wave 3 (tied for third).

Product X aided share of molecular diagnostic platforms increased from 1.4% in Wave 1 to 4.8% in Wave 3, roughly one year later.

Aided share of respondents for **Product X** more than doubled from 4.8% in Wave 1 to 12.5% in Wave 3.

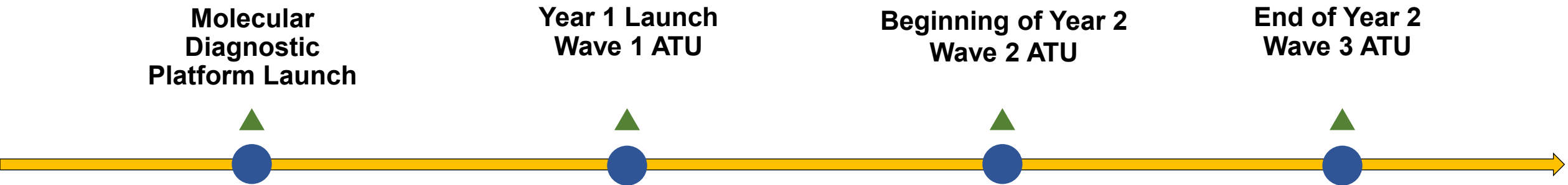
Aided awareness of **Product X** increased from 60.9% of Wave 1 respondents to 80.0% of Wave 3 respondents.

Wave 3 was the first time that **Product X** was volunteered (unaided) by respondents (7.5%) as a molecular diagnostic platform at their facility.

Molecular Diagnostic ATU Project Approach



- **Brand X**, a diagnostics company, partnered to conduct a marketing research program (awareness, trial and utilization - ATU) to monitor the launch of their new platform, **Product X**.
- Wave 1: Capture baseline
- Wave 2: Evaluate the impact of an initial media buy for the brand
 - Platform performance (**Product X**) was quite strong, but awareness needed improvement
- Wave 3: Assess further investment in promotion for the platform (**Product X**) that was made through various programs (webinars, trade shows, etc.)



Molecular Diagnostic ATU Project Approach (continued)



Recruitment Criteria (per Wave):

- U.S. Laboratorians/Scientists who are Managers/Directors in the lab:
 - Moderate to significant involvement regarding molecular testing tasks:
 - ✓ Evaluating platforms and assays
 - ✓ Making purchase decisions
 - 1,000+ samples requiring any molecular diagnostics testing/year
 - **Target** 30 respondents with 500+ samples requiring molecular diagnostics testing for just respiratory related diagnosis and **target** 10 without.
 - 1+ years working in current facility



Survey Detail (per Wave):

n=30-40 web surveys were completed each wave.

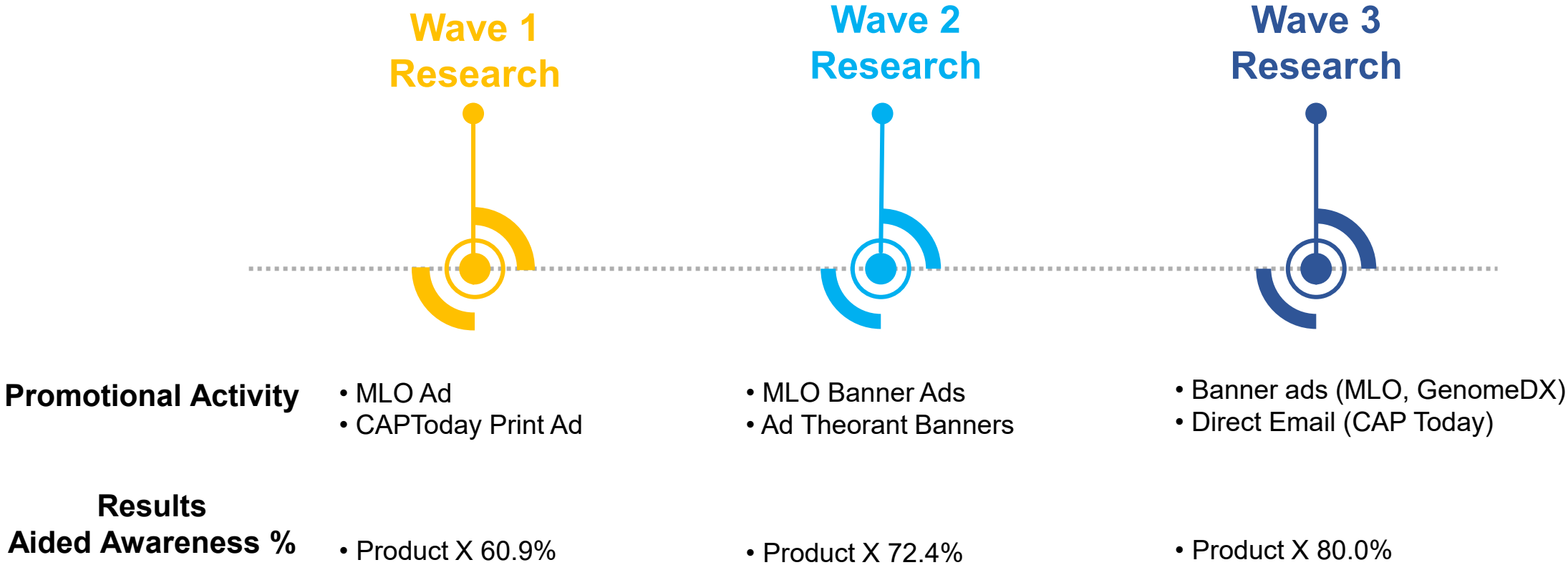
- Due to the small universe of respondents, each was recruited and screened via phone.
- By Wave 3, 38% of respondents had participated in a previous wave.
- If they qualified from the screening process, they were sent a link via email to complete the remainder of the online survey.
- Each web survey lasted approximately 30 minutes.
- A brief, un-blinded description of the molecular diagnostic platform was tested with respondents.

Sample Analyses from Quantitative Phase

Product X awareness performance improved with increased promotional activity.



- As recommended promotional activity increased, aided awareness rose from 60.9% in Wave 1 to 80.0% in Wave 3.

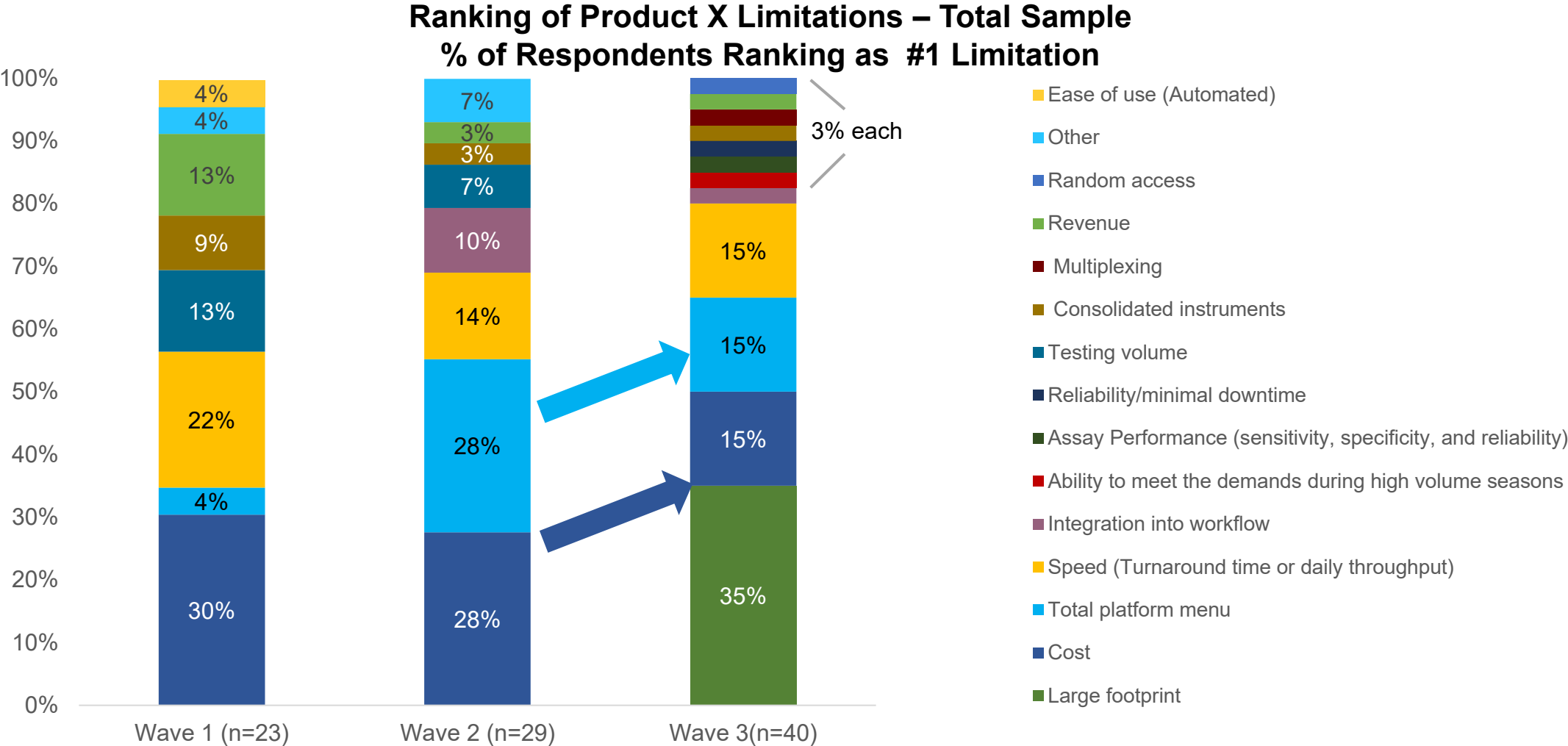


QX. Have you ever heard of a fully automated diagnostic platform called Product X made by Company Y?

Communication tactics on cost and platform menu weaknesses have been effective, lowering the perception of these attributes as a Product X limitation.



- Wave 3 respondents ranked a new attribute, “large footprint” (35.0%) as the top **Product X** limitation.
- “Cost” dropped as a **Product X** #1 limitation from 28% to 15%.
- Likewise, “platform menu” also dropped as a **Product X** #1 limitation from 28% to 15%.



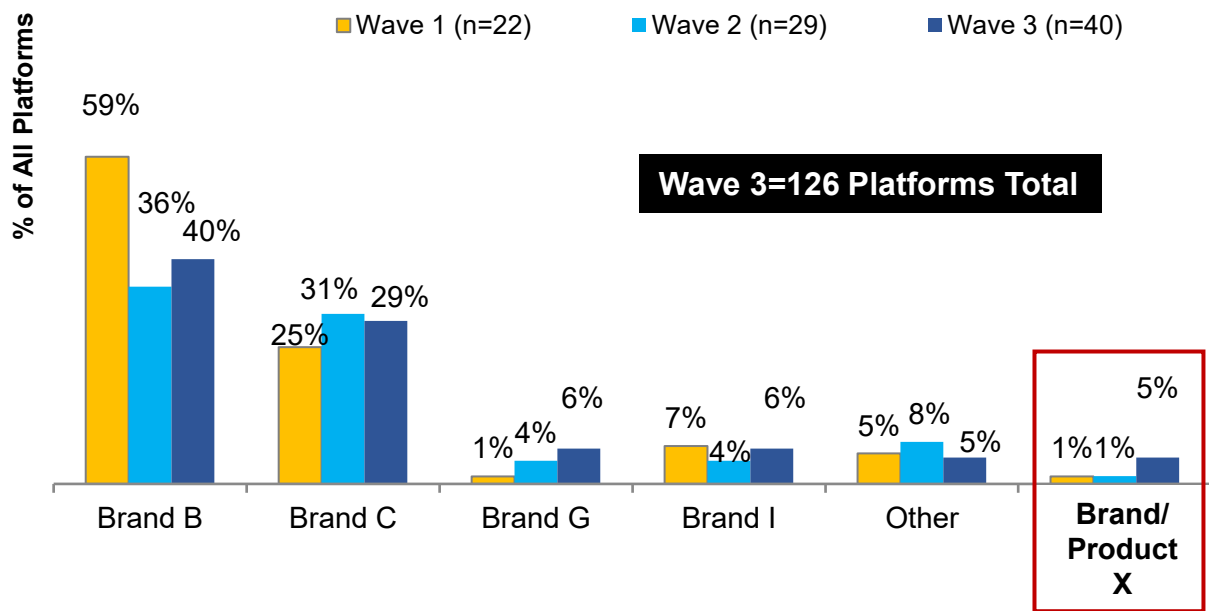
Product X experienced notable uptake in purchase/use at a manufacturer and product level when comparing Wave 3 to Wave 2.



- Since facilities can have more than one molecular diagnostic platform engaged, it is important to assess the share of platforms purchased as a percentage of all platforms represented among the sample of respondents (manufacturer level), but also as a percentage of each respondent/facility participating.

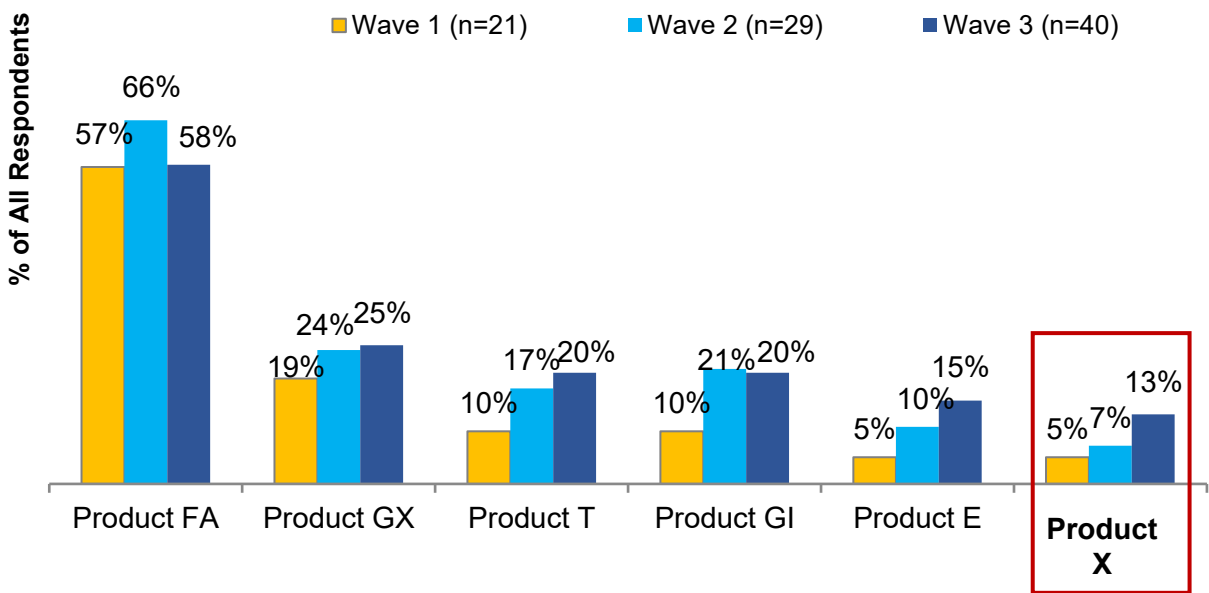
Top Platforms by Manufacturer (% of All Platforms) Total Sample

- In Wave 3, while Brand B (40% of all platforms in the survey) maintains the top spot in terms of total number of platforms, **Product X** has nearly quadrupled (5%) since the previous wave.



Top 6 Platforms in Facility by Brand/Model (% of Respondents) Total Sample

- Product X also has shown growth to 13%, as percentage of all facilities/respondents participating.
- Products FA (Wave 3 57.5%) and GX (Wave 3 25.0%) were the most common platforms among respondents.





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Thank you for your time!