



Case: A major diagnostics player wanted an assessment of the future market landscape for low-throughput (LT) molecular diagnostic (MDx) testing to develop a long-term platform strategy to address the future needs of this market

DeciBio Tailored Approach:




Secondary Research:

- Performed a **benchmark analysis of all major LT MDx competitors**, profiling multiple attributes (e.g., turnaround time, throughput, current menu, future menu, key features) for each LT MDx platform



Primary Research:

- Conducted **66 in-depth stakeholder interviews** with lab directors from MDx labs in multiple settings and of varying throughputs in 20 different countries
- Conducted a **~250 person survey** and choice-task conjoint analysis of lab directors from labs of varying throughput and organization type from 15 different countries



Quantitative Analysis:

- Built **comprehensive, bottom-up and top-down models** of the LT MDx market segmented by geography, lab throughput, therapeutic area, lab type, test regulatory status, and platform technology
- Conducted a **conjoint choice-task analysis** to assess ideal instrument features (6 attributes, 17 levels), with results segmented by respondent geography and lab throughput
- Built a **dynamic NPV model** using the output of the conjoint analysis to estimate the potential market share captured and NPV of developing an instrument with any combination of features explored in the conjoint

Outcomes:

- DeciBio identified different customer behaviors, and strategies that the client should pursue in the LT MDx market in different geographies
- DeciBio specified which instrument features should be prioritized in future platform development efforts in order to capture LT market share
- DeciBio identified gaps in client's portfolio that should be addressed to target a potentially disruptive segment of the LT MDx market

Project Summary

Industries:	<ul style="list-style-type: none">Clinical diagnostics
Topic(s):	<ul style="list-style-type: none">Molecular diagnostics
Project Components:	<ul style="list-style-type: none">Voice-of-customer researchMarket modellingConjoint analysisNPV analysisCountry market profilesStrategy development
Project Timeline:	<ul style="list-style-type: none">Phase I: ~10 weeksPhase II: ~13 weeks
Geographic Scope:	<ul style="list-style-type: none">U.S., Canada, EU-5, Netherlands, Austria, Japan, China, Mexico, Brazil, Argentina, Chile, India, Vietnam, Thailand, Indonesia

By the Numbers

66 Stakeholder Interviews	~250 Stakeholders Surveyed
>15 Countries Researched and Modelled	16 Competitors Benchmarked