

**ASSESSMENT OF ADVANCED THERAPY ADOPTION AND
MARKET OPPORTUNITY IN OVERACTIVE BLADDER
MANAGEMENT IN THE UNITED STATES**

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1. Introduction

Overactive Bladder (OAB) represents one of the most prevalent yet under-addressed chronic urological conditions affecting adult populations globally. Characterized by symptoms such as urinary urgency, frequency, nocturia, and urge urinary incontinence, OAB significantly impacts patient quality of life, emotional well-being, social confidence, and daily functioning. Although the condition is rarely life-threatening, its long-term burden on patients and healthcare systems is substantial. In the United States alone, millions of individuals are estimated to suffer from OAB-related symptoms, with prevalence increasing notably among aging populations and female patients. Beyond clinical burden, the condition contributes to rising healthcare utilization, productivity loss, caregiver dependency, and increasing economic expenditure associated with chronic symptom management.

Despite the large patient population associated with OAB, treatment progression across the care pathway remains highly fragmented. A considerable proportion of patients either remain undiagnosed, discontinue pharmacotherapy due to inadequate symptom relief or adverse effects, or fail to progress towards advanced treatment options even after experiencing refractory symptoms. Traditional first-line and second-line management approaches, including behavioural therapy and oral pharmacotherapy, often demonstrate limitations related to efficacy, long-term adherence, and tolerability. As a result, a clinically significant gap exists between patients who are eligible for advanced therapies and those who ultimately receive them.

Over the past decade, the advanced OAB therapy landscape has evolved substantially with the availability of therapies such as Intradetrusor Botulinum Toxin (Botox), Percutaneous Tibial Nerve Modulation (PTNM), Sacral Neuromodulation (SNM), and more recently, Implantable Tibial Neuromodulation (ITNM). These therapies aim to provide symptom relief for patients who remain refractory to conservative and pharmacological treatment approaches. However, therapy adoption across the healthcare ecosystem has remained uneven. Certain therapies, particularly Botox, continue to dominate utilization patterns due to physician familiarity, reimbursement support, established clinical evidence, and procedural accessibility. At the same time, newer neuromodulation technologies continue to face challenges associated with physician awareness, workflow integration, patient acceptance, and commercialization barriers.

This evolving treatment environment has increased the importance of healthcare analytics and market intelligence within the OAB therapy landscape. Understanding patient progression patterns, physician adoption behaviour, reimbursement dynamics, therapy utilization trends, and healthcare delivery gaps has become increasingly important for healthcare providers, medtech organizations, and strategic stakeholders seeking to improve therapy penetration and optimize patient outcomes. In particular, physician specialties such as urologists, urogynecologists, and Female Pelvic Medicine and Reconstructive Surgery (FPMRS) specialists play a critical role in determining advanced therapy utilization patterns and market expansion opportunities.

The growing availability of healthcare utilization datasets, CMS Medicare procedure data, and secondary market intelligence sources has further enabled more structured analysis of therapy adoption trends and physician behaviour. These analytical approaches provide valuable insights into specialty-wise procedure distribution, high-volume provider identification, patient funnel progression, and overall addressable market estimation for advanced OAB therapies.

Against this background, the present study aims to systematically assess the market opportunity and adoption dynamics associated with advanced therapies for Overactive Bladder management in the United States. By integrating patient funnel modelling, physician analytics, treatment landscape assessment, CMS utilization analysis, and market forecasting methodologies, the study seeks to evaluate the gap between eligible patient populations and actual therapy adoption while identifying the major drivers, barriers, and strategic opportunities influencing the future growth of advanced OAB therapies.

The findings of this study are expected to contribute towards a better understanding of healthcare delivery gaps, physician utilization patterns, commercialization opportunities, and healthcare analytics applications within the evolving advanced OAB therapy market.

2. Research Question

How do patient funnel dynamics, physician adoption patterns, reimbursement landscape, and advanced therapy utilization influence the market opportunity and adoption of advanced therapies for Overactive Bladder (OAB) management in the United States?

3. Objectives

The study proposes to address the following objectives:

1. To assess the overall market opportunity associated with advanced therapies for Overactive Bladder (OAB) management in the United States.
2. To estimate the eligible patient population for advanced OAB therapies through patient funnel and treatment progression analysis.
3. To analyse the treatment pathway of OAB patients from diagnosis and pharmacotherapy utilization to advanced therapy adoption.
4. To evaluate the comparative landscape of advanced OAB therapies including Botulinum Toxin (Botox), Percutaneous Tibial Nerve Modulation (PTNM), Sacral Neuromodulation (SNM), and Implantable Tibial Neuromodulation (ITNM).
5. To analyse physician participation and specialty-wise utilization trends among urologists, urogynecologists, and Female Pelvic Medicine and Reconstructive Surgery (FPMRS) specialists.
6. To assess CMS Medicare utilization trends and physician procedure patterns associated with advanced OAB therapies.
7. To identify key drivers and barriers influencing patient and physician adoption of advanced OAB therapies.
8. To evaluate market growth trends, competitive landscape, and future market potential associated with advanced OAB therapies.
9. To develop strategic insights and recommendations for improving therapy adoption, physician engagement, and market penetration within the advanced OAB therapy landscape.

4. Hypothesis

Not Applicable. This is a descriptive, observational, retrospective study based entirely on secondary data. It does not test interventional effects or propose causal relationships.

5. Material and Methods

Study Design

This study is descriptive, analytical, and retrospective in nature and is based primarily on secondary research and healthcare analytics methodologies. The study focuses on analysing treatment pathways, patient opportunity assessment, physician utilization patterns, healthcare market dynamics, and advanced therapy adoption trends related to Overactive Bladder (OAB) management in the United States.

Setting

The study focuses on the United States healthcare market, specifically within the advanced therapy segment for Overactive Bladder (OAB) management. The analysis includes patient populations, physician specialties, treatment adoption trends, reimbursement patterns, and market growth dynamics associated with advanced OAB therapies.

Study Population

The study population comprises:

- Patients diagnosed with Overactive Bladder (OAB) within the United States healthcare market
- Patients progressing from pharmacotherapy towards advanced OAB therapies
- Physicians involved in advanced OAB therapy procedures, including urologists, urogynecologists, and Female Pelvic Medicine and Reconstructive Surgery (FPMRS) specialists
- Advanced OAB therapies including Botulinum Toxin (Botox), Percutaneous Tibial Nerve Modulation (PTNM), Sacral Neuromodulation (SNM), and Implantable Tibial Neuromodulation (ITNM)

Inclusion Criteria

- Published literature and publicly available data related to Overactive Bladder (OAB) epidemiology and treatment pathways
- Secondary research sources related to advanced OAB therapies and healthcare market trends
- CMS Medicare utilization datasets related to advanced OAB procedures and physician activity

Exclusion Criteria

- Data sources unrelated to OAB management or advanced therapy utilization
- Non-verifiable or incomplete secondary research sources
- Studies or reports lacking sufficient relevance to advanced OAB treatment pathways or market analysis

Study Tools

The study will draw on the following resources and analytical tools:

- Microsoft Excel for structured database creation, organization, and descriptive analysis

- CMS Medicare datasets for physician utilization and procedure analysis
- Scientific publications and peer-reviewed journals for clinical and epidemiological understanding
- Market research reports and healthcare industry publications for market landscape analysis

Duration of Study

The study is expected to be completed over a period of approximately 8–12 weeks, including secondary research, data collection, analysis, interpretation, and report preparation.

Sample Size

The study does not involve direct primary sampling. The analysis is based on secondary datasets, published literature, healthcare utilization data, market intelligence sources, and publicly available healthcare information relevant to advanced OAB therapy assessment.

Sampling Technique

A purposive and secondary research-based sampling approach has been adopted. Relevant datasets, literature sources, market reports, and physician utilization information were selected based on their relevance to the objectives of the study.

Data Collection Procedure

Data for the study were collected through extensive secondary research from publicly available healthcare databases, scientific literature, CMS Medicare datasets, market reports, treatment guidelines, and healthcare industry publications. The collected information was systematically reviewed, validated, and organized to support patient funnel modelling, physician analytics, therapy comparison, market sizing, forecasting, and strategic interpretation.

Operational Definitions

The following definitions will guide consistent classification throughout the study:

- **Overactive Bladder (OAB):** A chronic urinary condition characterized by urinary urgency, frequency, nocturia, and urge urinary incontinence.
- **Advanced OAB Therapies:** Treatment options generally utilized after failure of conservative and pharmacological management, including Botox, PTNM, SNM, and ITNM.
- **Refractory OAB Patients:** Patients who do not achieve adequate symptom control through pharmacotherapy or conservative management approaches.
- **Patient Funnel Analysis:** A structured analytical approach used to estimate patient progression through different stages of diagnosis, treatment, and advanced therapy eligibility.
- **Physician Analytics:** Evaluation of physician participation, specialty distribution, procedure utilization, and therapy adoption trends.

Data Analysis Plan

The collected data were analysed using descriptive and analytical methodologies appropriate for healthcare analytics and market assessment studies. Patient funnel modelling was conducted to estimate advanced therapy eligible populations and overall market opportunity. Physician analytics and CMS Medicare utilization trends were evaluated to understand specialty participation and therapy adoption patterns.

Comparative assessments were performed across advanced therapies based on treatment characteristics, patient convenience, physician utilization, and market positioning. Market sizing and forecasting approaches were utilized to estimate future growth potential and therapy adoption opportunities.

The findings were interpreted using charts, tables, graphical representations, and analytical commentary to support evidence-based conclusions and strategic recommendations.

6. Ethical Considerations

This study is based entirely on secondary research and publicly available healthcare information. No direct patient interaction, primary clinical data collection, or confidential patient information was involved at any stage of the study. All information utilized in the study was obtained from publicly accessible and ethically permissible sources.

Throughout the study, efforts were made to maintain accuracy, transparency, proper citation practices, and academic integrity. The study does not involve any ethical risk related to human participation or patient confidentiality.

7. Implications of Research

The findings of this study are expected to provide meaningful insights into the evolving landscape of advanced therapies for Overactive Bladder (OAB) management in the United States. The research may contribute towards understanding the gap between eligible patient populations and actual advanced therapy utilization, thereby highlighting potential areas for healthcare improvement and market expansion.

For healthcare analytics professionals and researchers, the study may provide a practical framework for patient funnel modelling, physician analytics, healthcare utilization analysis, and market opportunity assessment within the medtech and healthcare consulting domain.

For healthcare providers and industry stakeholders, the findings may support better understanding of physician adoption patterns, reimbursement influences, competitive dynamics, and strategic growth opportunities associated with advanced OAB therapies.

The study may also contribute towards strategic decision-making related to commercialization planning, physician targeting, patient engagement strategies, and future healthcare innovation within the advanced OAB therapy market.

8. References

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