Prescribing Influences: Alzheimer’s Disease - Alleviating symptoms remains the goal for prescribers

Description:  
Datamonitor conducted a survey of neurologists to ascertain the perceived level of unmet need in Alzheimer’s disease and to assess which factors have the greatest influence on prescribing decisions. As emerging disease-modifying therapies threaten to set a new benchmark, Datamonitor has gauged the relative importance of slowing disease progression versus improving Alzheimer’s disease symptoms.

Features and benefits
- Understand the key unmet needs in Alzheimer’s disease treatment and their relative importance, as rated by neurologists.
- Review the recommendations of available Alzheimer’s disease treatment guidelines.
- Understand the patient care pathway, and how it can be influenced to drive ethical drug purchase.
- Assess the marketing strategies of the leading companies in the Alzheimer’s disease market.
- Gauge the attributes of a drug that most influence physician prescribing behavior.

Highlights
Neurologists rated the call for an effective disease-modifying therapy as the greatest unmet need. Current drugs provide symptomatic benefit only, leaving the underlying neurodegeneration to continue unabated. The opportunity also exists for more effective drugs in treating the cognitive and functional deficits associated with Alzheimer’s disease.
In addition to sponsoring disease awareness campaigns, the key players in the Alzheimer’s disease market have been generating brand awareness by targeting caregivers. Companies with new reformulations on the market have switched their direct-to-consumer marketing focus to their latest products.
Efficacy on key Alzheimer’s disease symptoms such as cognitive and functional deficits was considered the primary factor when deciding upon a treatment. However, a new drug with symptomatic efficacy would need to be differentiated from the existing cholinesterase inhibitors for it to find widespread use.

Your key questions answered
- What are the most important unmet needs in Alzheimer’s disease treatment?
- How do different attributes of a drug's profile influence neurologists' prescribing decisions?
- How do Alzheimer's disease patients progress through the care pathway and what do the treatment guidelines recommend?
- Which marketing strategies are most widely employed and have been the most successful?

Contents:

Executive Summary
Strategic scoping and focus
Datamonitor key findings
Related reports
OVERVIEW
Catalyst
Summary
UNMET NEEDS
Disease-modifying therapies
Current treatments are only palliative and do not prolong survival
A disease-modifying drug should be able to improve clinical outcomes as well as prolonging survival
Therapies offering improved symptomatic benefit
Symptoms of Alzheimer’s disease involve deficits in cognition and executive function
Currently approved therapies display modest efficacy at best
Large opportunity exists for more effective symptomatic drugs
Approved Alzheimer’s treatments have set a high benchmark for tolerability
Better diagnostic tools leading to earlier diagnosis
Diagnosis of Alzheimer's disease has made very little progress
Early treatment with disease-slowing drugs should produce a better outcome
Better understanding of Alzheimer's disease etiology
Link between underlying pathology and disease progression still not understood
Current research suggests that soluble amyloid species are toxic, not plaques
Increased presentation and diagnosis rates
Estimates for Alzheimer's disease diagnosis rates vary between 19% and 42%
There can often be a significant delay between onset of symptoms, presentation, and disease diagnosis
Increased awareness, better diagnostic tools, and disease-modifying drugs can drive an increase in presentation and diagnosis rates

PRESCRIBING INFLUENCES
Treatment guidelines
Cholinesterase inhibitors are recommended for first-line pharmacotherapy
Memantine should be reserved for moderate to severe Alzheimer's disease
Change in stance on prescribing and reimbursement in the UK and Germany
Patient acquisition process
Trigger point one: presymptomatic diagnosis of Alzheimer's disease
Trigger point two: increasing presentation rate
Trigger point three: driving switching to reformulated products
Trends in marketing strategies
Marketing strategy for leading brands
Sponsorship and disease awareness campaigns
Direct-to-consumer advertising
Factors influencing physician decision making
Neurologists report efficacy-based factors are the primary consideration when prescribing Alzheimer's disease drugs
Safety is the most important non-efficacy related factor considered by neurologists when prescribing Alzheimer's disease drugs
Treatment guidelines influence physicians more than any other non-clinical factor
Reimbursement
Aricept, Exelon, and Namenda possess favorable formulary listings in the US
Reimbursement in the EU

BIBLIOGRAPHY
Journal papers
Websites
Datamonitor reports

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Physician research methodology
Physician sample breakdown
The survey questionnaire
Introduction
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Section 2: Influencing factors on prescribing

APPENDIX B
Contributing experts
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