Prescribing Influences: Multiple Sclerosis - Therapies that reverse neuronal damage are most sought after

Description: Introduction

Datamonitor conducted a survey of neurologists to ascertain the perceived level of unmet need in multiple sclerosis and to assess which factors have the greatest influence on prescribing decisions. The analysis is designed to provide an understanding of the opportunities in the market and to support the successful competitive positioning of multiple sclerosis brands.

Features and benefits

- Understand the key unmet needs in multiple sclerosis treatment and their relative importance, as rated by prescribing neurologists.
- Understand the key drivers of brand choice in multiple sclerosis management and their relative importance, as rated by prescribing neurologists.
- Understand the patient care pathway, and how it can be influenced to drive ethical drug usage.
- Assess the marketing strategies of the leading companies in the multiple sclerosis market.
- Gauge the attributes of a drug that most influence physician prescribing behavior.

Highlights

- The opportunity to stop or reverse multiple sclerosis is huge, as current drugs only slow the course of the disease. Development of effective therapies to treat progressive cases is considered the second most important unmet need by interviewed neurologists.
- There are no official international guidelines for the chronic disease-modifying treatment of multiple sclerosis. As the number of disease-modifying treatment options increase over the next decade Datamonitor anticipates the development of official multiple sclerosis clinical guidelines and treatment algorithms will become a high priority.
- Surveyed neurologists rated slowing disease progression and reduction in relapses as the leading factors to consider when deciding upon treatment. This is unsurprising, as with no cure available, prevention of disease progression aimed at enhancing the quality of life for sufferers is the physician's priority.

Your key questions answered

- What are the most important unmet needs in multiple sclerosis treatment?
- How do different attributes of a drug's profile influence neurologists' prescribing decisions?
- How do multiple sclerosis 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
- Unmet need one: therapies that stop or reverse neuronal damage
  - Current treatments only slow the disease or treat symptoms
  - Stopping or reversing the disease is the ultimate goal
- Unmet need two: therapies for progressive multiple sclerosis
  - Only Betaseron and Novantrone are approved for progressive multiple sclerosis
  - Approval sought in relapsing multiple sclerosis before progressive subtypes
- Unmet need three: therapies offering greater relapse prevention
Unmet need four: therapies with improved side-effect/tolerability/safety profile
Relatively mild side effects result in discontinuation
Safety issues hinder uptake of efficacious therapies
Unmet need five: therapies offering improved symptom relief
Despite recent approvals, the need for improved symptomatic efficacy remains an issue
Unmet need six: therapies offering improved management of acute attacks
Current treatment options carry limitations
Intravenous methylprednisolone is the mainstay of acute treatment, but it is limited to short-term use
Oral steroids are used by almost a quarter of patients, but may increase risk of side effects
Aspirin and nonsteroidal anti-inflammatory drugs may help reduce side effects but are only moderately effective
Unmet need seven: therapies offering improved mode of administration
Unmet need eight: lower cost of therapies
[Missing title]
Unmet need nine: therapies with less-frequent dosing regimens
Dosing frequency may compromise patient compliance
Unmet need 10: fewer drug-drug interactions
The ability to combine treatments depends on drug-drug interactions

PRESCRIBING INFLUENCES
Treatment guidelines
No official international guidelines for the chronic disease-modifying treatment of multiple sclerosis
Several treatment guidelines are in place for the management of acute relapses of multiple sclerosis
Patient acquisition process
Introduction
Patient care path
Points of influence in the patient care path
Trends in marketing strategies
Company sponsored multiple sclerosis information websites
Factors influencing physician decision-making
Neurologists report clinical factors as being most important for influencing brand choice
A brand's overall efficacy is the number one factor for prescribing neurologists
Safety and tolerability are the second-most important influencers driving brand choice
Treatment recommendations influence physicians more than any other non-clinical factor
Cost is the main commercial factor for uptake, although less of an influencer than clinical factors
Reimbursement
US formulary tier status for leading brands
Disease-modifying multiple sclerosis drugs are in the highest co-payment tiers
Lack of reimbursement in the UK

BIBLIOGRAPHY
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Datamonitor reports
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Physician research methodology
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The survey questionnaire
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Section 2: Influencing factors on prescribing
Section 3: New therapies entering Multiple Sclerosis
Demographics
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Contributing experts
Conferences attended
Report methodology

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