Prescribing Influences: Schizophrenia – Plethora of antipsychotics fail to address negative symptoms

Description: This report analyzes the unmet needs of schizophrenia treatment and the attributes of drugs that influence the prescribing decisions made by physicians across the seven major markets. Datamonitor conducted a primary research survey of 140 psychiatrists across the seven major markets on their schizophrenia treatment choices and prescribing habits. A greater understanding of unmet needs and the factors that influence the prescription of drugs will aid companies in effectively positioning their treatments in the increasingly competitive schizophrenia market.

Scope

- Understand the key unmet needs in the current management of schizophrenia.
- Gauge the attributes of a drug that most influence physician prescribing behavior.
- Review the recommendations of available schizophrenia treatment guidelines.
- Understand which points within the schizophrenia patient care pathway pharmaceutical companies can influence.
- Understand the different marketing strategies for key antipsychotic brands.

Highlights

- Psychiatrists rate improved efficacy of treatments for negative symptoms as the greatest unmet need. This unmet need presents a commercial opportunity for novel treatments to achieve product differentiation in the increasingly competitive antipsychotics market.

- Treatment options are required for patients with refractory schizophrenia. Therefore, antipsychotics with superior efficacy will be a welcome addition to the physician’s armamentarium.

- Prescribers’ decisions are predominantly influenced by the efficacy of treatments for positive symptoms. New treatments with superior efficacy and tolerability would be welcomed, although they would need to compete with generics and well-established brands.

Reasons to Purchase

- What are the key areas of unmet need in the current management of schizophrenia?
- How do different attributes of a drug’s profile influence psychiatrists’ prescribing decisions for their patients with schizophrenia?
- How do schizophrenia patients progress through the care pathway and what do the current treatment guidelines recommend?
- What marketing strategies are most widely employed within the schizophrenia market?

Contents:

OVERVIEW
- Catalyst
- Summary

EXECUTIVE SUMMARY
- Strategic scoping and focus
- Datamonitor key findings
- Related reports

UNMET NEEDS
- Improved efficacy of treatments for negative symptoms
- Current therapies do not adequately treat the negative symptoms of schizophrenia
- Multiple classifications of negative symptoms complicate development of targeted treatments
- The FDA recognizes the need for treatments for the negative symptoms of schizophrenia
- Management of refractory patients
  - Few effective pharmacological treatment options are available for the treatment of refractory patients
  - Off-label prescribing and polypharmacy are treatment strategies currently employed for refractory schizophrenia

- Treatments with more favorable side-effect profiles
  - Antipsychotics are associated with a poor side-effect profile, which exerts a negative impact on compliance
  - It is necessary for antipsychotics to balance good efficacy with a favorable side-effect profile

- Improved patient compliance
  - A large proportion of schizophrenic patients are not fully compliant with medication
  - Poor compliance negatively impacts treatment outcomes
  - Patients are switched to long-acting depots to improve patient compliance

- Treatment options for cognitive impairment in schizophrenia
  - A sizable proportion of patients with schizophrenia are affected by cognitive impairment
  - The underlying mechanisms of cognitive impairment create challenges for developing targeted therapies
  - The need for treatment of cognitive symptoms has been recognized by the FDA and the NIMH-MATRICS initiative

- Less invasive modes of administration for acute patients
  - Novel formulations improve treatment options for physicians

- Treatments preventing self-harm
  - A heterogeneous range of factors are associated with suicide risk in schizophrenia
  - Clozapine is the only medication recommended for the management of suicide risk in schizophrenia

PREScribing INFluences
- Treatment guidelines
  - No single antipsychotic medication is recommended for first-line treatment of schizophrenia in the US, Germany, Spain, and the UK
  - Patient-related factors should be considered when deciding upon antipsychotic treatment
  - Long-acting injectable formulations are a treatment option for patients who are non-adherent to therapy
  - Clozapine can be used in treatment-resistant patients and for the treatment of residual symptoms
  - Weight gain is an important side effect to consider for patients with schizophrenia
  - Physicians' prescription practices are in line with recommendations in published clinical guidelines

- Patient acquisition process
  - Patient care path
  - Points of influence in the patient care pathway

- Trends in marketing strategies
  - Marketing strategy for leading brands
  - Sponsorship/disease awareness campaigns
  - Physician detailing
  - Direct-to-consumer advertising

- Factors influencing physician decision-making
  - Efficacy in treating positive symptoms exerts the greatest influence on physicians' prescribing decisions
  - Efficacy in treating negative symptoms of schizophrenia
  - Safety and side-effect profiles are an ongoing concern when prescribing medication
  - Prescribers have limited choice for the treatment of cognitive symptoms
  - Convenience of dosing and administration exert the least influence on prescribers' decisions

- Reimbursement
  - US formulary tier status for leading brands

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