U.S. Mobile Health

Audience Jumps

TRENDING NOW: Having mobile-optimized websites is key in light of the growth of mobile health.


Monique Levy

The number of Americans using mobile phones for health information or tools reached 95 million in 2013, Manhattan Research's Cybercitizen Health U.S. 2013 study has found — up 27% from 75 million a year ago. Smartphones have become, for many, an indispensable source of healthcare information — 38% of online smartphone users agree that the device is essential for finding health and medical information.

For pharma marketers, having mobile-optimized websites is key in light of the growth of mobile health. The study found that consumers access health information on mobile phones at home, not just on the go, and that while adoption of mobile health apps from pharma companies is so far low, they are strongly influential for those users.

The study also shows that mobile health adoption, activities, and attitudes vary greatly among the patient audiences tracked, highlighting the need for marketers to understand mobile behavior by unique therapeutic segments.

"Many pharma marketers still underestimate both the opportunity and complexity of the mobile channel," says Monique Levy, VP of research at Manhattan Research. "Many marketers will need to reset assumptions around when, where and how these devices are used for health. What's clear is that patients are using these devices throughout the patient journey, for quick questions and deep research, and increasingly to actually manage their condition and care."

For more information, visit manhattanresearch.com.

e-Prescription Use Drives CLOUD COMPUTING

Filling prescriptions electronically is one of the demands of IT systems in healthcare and one that is fueling cloud computing system purchases, according to a report from Kalorama Information. The global market for cloud computing in healthcare was estimated at $3.9 billion in 2013, representing 21.1% growth over 2012.

Kalorama notes that the use of e-prescribing technologies has jumped to about 35% in 2010 from less than 10% in 2004. Researchers say hospitals, physician offices, and retail pharmacies will adopt cloud computing systems that can store information accessible to healthcare organization employees at a different location.

Biopharma Launches that ORIGINATE FROM IN-LICENSING DEALS INCREASE

Biopharma companies industrywide are increasingly moving away from in-house research and toward acquisitive strategies to build their portfolios and grow sales. According to findings from a recent study by Decision Resources, the fraction of new product launches that originate from in-licensing has increased dramatically over the last decade. In 2012, 53% of new product launches were in-licensed during development, compared with an average of 32% between 2003 and 2012.

The report also finds that while 72% of marketed products and pipeline compounds for large pharma companies are sourced in-house or through corporate acquisitions, the corresponding fraction for regional and mid-size companies is only 52%, likely reflecting the latter's reliance on in-licensing of brands for distribution in regional markets. Although company R&D budgets on average have remained constant as a percentage of pharmaceutical sales since 2008, the increasing cost of new product development makes it unlikely that in-house R&D programs can maintain constant levels of productivity.

"As biopharma companies look toward outside partnerships to supplement their pipelines, we see deal-making concentrated in therapeutic areas that are a combination of high sales and high growth, such as oncology," says Decision Resources Analyst Patrick Flight, Ph.D. "Whether the current trend of external sourcing of innovation will remain a viable strategy in an increasingly competitive market for in-licensing and product acquisition opportunities remains to be seen."

Study Dispels Myth that Rx and OTC Consumers ARE HARDER TO REACH ONLINE


Dan Stein

Contrary to the pharmaceutical industry's commonly held belief that active prescription and OTC brand consumers are harder to find online than offline, a new study reveals that the online audience is just as active — and for select categories, more active — than the general population.

Crossix Solutions evaluated sample Rx and OTC transactional data from its proprietary data network of more than 100 million consumer records and panel of 7 million opted-in online consumers to compare the Rx and OTC purchase behavior of the two populations during a 12-month period.

While the overall prescription and OTC purchase behavior of the two populations suggests parity, Crossix discovered more pronounced variances in specific treatment categories. For example, the online audience indexed higher within categories related to lifestyle, such as contraception, and psychological conditions, such as depression and ADHD. Conversely, the online audience indexed lower for chronic and life-threatening conditions most commonly associated with an aging population, such as stroke, heart disease, and high cholesterol.

"For years, the perception throughout the pharma industry has been that the online channel represents a less targeted audience, relative to more traditional, offline channels," says Dan Stein, Crossix senior VP, product strategy and analytics services. "Our study dismisses this myth, and should give brand marketers and digital media agencies alike greater confidence in their ability to reach their desired audiences within the online space, across all types of publishers and sites."

For more information, visit crossix.com.

THERAPEUTIC TRAX...

AUTOIMMUNE DISORDERS

About one-half of surveyed rheumatologists and payers report that they believe Pfizer's Xeljanz has a comparable effect on the signs and symptoms of rheumatoid arthritis (RA) in comparison to TNF-alpha inhibitors. In addition, about 40% of surveyed physicians and payers believe Xeljanz's safety profile is the same as the most widely used biologic agents. Interestingly, up to one-third of payers and physicians believe Xeljanz has a less favorable safety profile than TNF-alpha inhibitors.

Source: Decision Resources, Rheumatoid Arthritis: U.S. Physician and Payer Perspectives on the Opportunity for Novel Oral Kinase Inhibitors, Newer Formulations of Established Biologics, Novel Biologics, and Biosimilars

For more information, visit decisionresources.com.

CANCER

The global market for cervical cancer drugs and diagnostics was valued at $11.3 billion in 2012 and is expected to reach $11.6 billion by 2013. The market is expected to reach nearly $15.6 billion by 2018, and CAGR of 6.1%.

Source: BCC Research, Therapies and Diagnostics for Cervical Cancer

For more information, visit bccresearch.com.

CNS DISORDERS

Although Europe trails behind the U.S. in terms of market revenue, ADHD therapeutics markets are expected to show strong growth, with Spain predicted to witness a CAGR of 8% over 2012-2018, beating the U.S. CAGR of 6% during the same future period. European markets have not yet neared the saturation point that ADHD therapeutics are facing in the U.S., and there is an optimistic view for ambitious growth in this region. The ADHD therapeutics market across France, Germany, Italy, Spain and the UK is predicted to reach approximately $182 million in 2018.

Source: GBI Research. ADHD Therapeutics Market to 2018 - New Diagnostic Parameters for Adult ADHD Offer Hope for Higher Rates of Treatment

For more information, visit gbiresearch.com.

DIABETES

The type 2 diabetes market will nearly double over the next decade, increasing from $27 billion in sales in 2012 to $47 billion in 2022 in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan. The main factors fueling this growth are a continued increase in the drug-treated patient population and increased use of both currently available drugs and soon-to-launch emerging branded agents during this period.

Source: Decision Resources, Pharmacor Type 2 Diabetes

For more information, visit decisionresources.com.

DPP-IV inhibitors claim the largest share among branded oral therapies of newly diagnosed type 2 diabetes patients. DPP-IV inhibitors include Merck's Januvia, Bristol-Myers Squibb/AstraZeneca's Onglyza and Boehringer Ingelheim's Tradjenta. Metformin and sulfonylureas continue to dominate first-line therapy use, while long-acting insulins are also more heavily used as a first-line therapy than the DPP-IV inhibitors, despite ADA/EASD guidelines recommending oral antidiabetic therapy prior to insulin administration.

Source: Decision Resources, Treatment Algorithms in Type 2 Diabetes

For more information, visit decisionresources.com.

The diabetic foot ulcer (DFU) treatment market will undergo impressive growth over a five-year period, increasing from $302 million in 2012 to $1.58 billion by the end of 2017, at a substantial CAGR of 39.9%. The imminent launch of the first two topical antibacterials indicated specifically for the treatment of diabetic foot infections will also lend a hand to the market growth. Innocoll's Cogenzia and Dipexium Pharmaceuticals' Locilex will be used either as an adjunct to systemic antibiotic therapy, or else to treat mild infections.

Source: GlobalData, OpportunityAnalyzer: Diabetic Foot Ulcers - Opportunity Analysis and Forecast to 2017

For more information, visit globaldata.com.

INFECTIONS

The global market for healthcare-acquired infections (HAI) treatments and products was valued at $12.3 billion in 2012 and is expected to reach $14.3 billion by 2013. The market is expected to grow to $21.3 billion in 2018, and register a five-year CAGR of 8.2% from 2013 to 2018.

Source: BCC Research, Healthcare-Acquired Infections: Devices, Pharmaceuticals and Environmental Products

For more information, visit bccresearch.com.

The global market for microbial products was valued at $117 billion in 2012 and is expected to grow to nearly $134 billion in 2013. The market is predicted to reach nearly $179 billion by 2018, and register CAGR of 6%.

Source: BCC Research, Microbial Products: Technologies, Applications and Global Markets

For more information, visit bccresearch.com

The hospital-treated MRSA (HT-MRSA) drug market will grow modestly over the next decade from $900 million in 2012 to $1 billion in 2022 in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan as many as eight new agents with activity against MRSA are forecasted to launch in the next 10 years. Among these agents, Cubist's second-generation IV/oral oxazolidinone, tedizolid, is best positioned for commercial success.

Source: Decision Resources, Pharmacor Methicillin-Resistant Staphylococcus Aureus

For more information, visit decisionresources.com.

KIDNEY DISEASE

The late-stage chronic kidney disease (CKD) mar-

ket in the U.S. and 5EU (France, Germany, Italy, Spain, and UK) in 2012 was valued at $1.88 billion. By 2017, late-stage CKD sales are expected to decline to $1.66 billion in the U.S. and EU, at a negative CAGR of 2.5%. This overall decline in market size is attributed to the loss of patent protection for major brands in the late-stage CKD market, and the changing reimbursement environment for oral treatments in dialysis patients.

Source: GlobalData, OpportunityAnalyzer: Late-Stage Chronic Kidney Disease (CKD)

For more information, visit globaldata.com.

RESPIRATORY DISORDERS

The asthma market is forecast to grow marginally over the forecast period across the leading eight developed nations, from $16.6 billion in 2012 to a projected value of $21.6 billion in 2019. This growth is expected despite the generic erosion facing the leading brands, and is a consequence of new market entrants and a disease prevalence that continues to rise, albeit not at rates as high as have been seen in the past. Some new, costly asthma therapies could be set to enter the asthma market, including GlaxoSmithKline's (GSK's) recently approved Relvar (fluticasone/vilanterol), and multiple monoclonal antibodies (mAbs).

Source: GBI Research, Asthma Therapeutics Market to 2019 - Breakthrough Biologics to Enhance Treatment of Severe Asthma and Drive Market Growth

For more information, visit gbiresearch.com.

SMOKING CESSATION

The global market for smoking cessation medicines was valued at $2.11 billion in 2012 and is expected to reach $2.12 billion by 2013. The market is expected to grow to $2.5 billion by 2018, and register a five-year CAGR of 3.4% from 2013 to 2018.

Source: BCC Research, Medicines for Smoking Cessation: Global Markets

For more information, visit bccresearch.com.

VACCINES

The global market for vaccine technologies was valued at $33.6 billion in 2012. The market is expected to reach nearly $43.4 billion by 2017, and register a CAGR of 5.3%. The development of vaccines is increasing in the emerging markets, driven by research funding from local governments and international organizations. In addition, due to the demand for cost-effective, high-quality products with stricter safety measures, vaccine manufacturers are seeking greater support from their suppliers and increased cooperation at the local production level.

Source: BCC Research, Global Markets for Vaccine Technologies

For more information, visit bccresearch.com

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