



## Physicians Find Obstacles for E-prescribing

**TRENDING NOW:** Shortcomings in e-prescribing systems hinder brand prescribing, challenging pharma to help improve systems.



Eric John

Primary care physicians are e-prescribing more than ever to increase accuracy and decrease costs, but a new report from SciMedica Group Marketing Research & Consulting reveals that these physicians are encountering significant obstacles with current e-prescribing systems, particularly in accessing accurate formulary information and prescribing branded products.

One finding is that formulary information, including prior authorization, co-pays, and other utilization management requirements, is frequently unavailable in current systems.

For more information, visit [scimedigroup.com](http://scimedigroup.com).

Fewer than half said they have access to formulary information when e-prescribing and fewer than a third said they have access to prior authorization or co-pay information.

Other factors cited as limiting to e-prescribing include the inability to e-prescribe controlled substances, technical difficulties transmitting e-prescriptions to pharmacies, and problems caused by missing or inaccurate patient information.

“These limitations have significant implications for the pharmaceutical industry,” says Eric John, senior VP of SciMedica Group MR&C. “If the formulary status of a drug is unavailable or inaccurate, physicians are more likely to prescribe a generic so the prescription isn’t rejected at the pharmacy. As an alternative, they’ll generate most of their prescriptions from a limited ‘favorites’ list that contains products they know won’t encounter barriers. Both of these practices deter brand use.”

### Study Addresses Launch and PRE-LAUNCH BUDGETS

For a new product to gain a foothold in today’s competitive pharmaceutical market, executives must understand where and when to invest in key launch activities. At the same time, product launch leaders have to balance the goals of containing expenditures and generating a successful launch. Spending for launch-related activities during the year their products entered the market ranged from \$130 million to \$2 million for the companies in the study, according to Best Practices. On average, study participants invested more than \$35 million for launch-related activities. Market entry for primary care product launches consumes far greater resources than specialty launches, the study showed. Correspondingly they receive two to three times greater budget resources at launch year to reach the much larger population of primary care physicians.

For more information, visit [best-in-class.com](http://best-in-class.com).

### Mobile Apps Market to

#### GROW

The global mobile healthcare market is estimated

at \$6.34 billion in 2013 and is expected to reach \$20.68 billion by 2018 at a CAGR of 26.7%, according to a new report from MarketsandMarkets. The mobile healthcare market comprises of connected medical devices, healthcare application, and related mobile technology.

Connected devices dominate the current market with around 85% of the total revenue contribution. Among different applications, cardiac monitoring, and fitness tracking are the most prominent uses of mobile-enabled connected devices.

The mobile application market is in an introductory phase, but is highly fragmented with an ample number of software-developing companies. A major restraining factor behind the growth of paid apps is the free access to maximum smartphone apps. Free apps constitute almost 90% of the download market of healthcare applications. Furthermore, significant price difference between health and medical apps lowers the adoption rate among healthcare professionals. Revenue contribution by these apps was not significant due to its very low average price range (\$1 to \$2 per download). Consideration of a mobile application as a medical device is also a questionable issue, although the FDA is formulating a framework to regulate the apps market.

For more information, visit [marketsandmarkets.com](http://marketsandmarkets.com).

### Consumers Want Access to MEDICAL RECORDS

Many U.S. consumers (41%) would be willing to switch doctors to gain online access to their own electronic medical records (EMR).

The survey, of more than 9,000 people in nine countries, shows that only about a third of U.S. consumers (36%) currently have full access to their EMR, but more than half (57%) have taken ownership of their record by self-tracking their personal health information, including their health history (37%), physical activity (34%) and health indicators (33%), such as blood pressure and weight.

“The rise of Meaningful Use mandates and a growing trend of self-care among consumers is shifting the role of an EMR from a mere clinical repository to a platform for shared decision-making.”



Dr. Kaveh Safavi

## THERAPEUTIC TRAX... ▶▶

## CANCER

The prostate cancer market is expected to grow by 50% over the next nine years. The combined sales of prostate cancer drugs across the United States, Japan, and the five major EU markets was worth \$4.4 billion in 2012 and is expected to reach \$6.6 billion by 2021, with a compound annual growth rate of 4.5%.

Source: Datamonitor Healthcare, Prostate Market

▼ For more information, visit [datamonitorhealthcare.com](http://datamonitorhealthcare.com).

The acute myeloid leukemia market in the United States and 5EU in 2012 was valued at \$151 million. The market is defined as sales of products prescribed as induction, consolidation or salvage therapies, including cytarabine, daunorubicin, idarubicin, and fludarabine. By 2017, the AML market is expected to grow to \$430.7 million at a CAGR of 23.3%.

Source: GlobalData, OpportunityAnalyzer: Acute Myeloid Leukemia - Opportunity Analysis and Forecasts to 2017

▼ For more information, visit [globaldata.com](http://globaldata.com).

The launch of emerging targeted therapies will have a significant impact on the non-small cell lung cancer treatment landscape. The launch of BMS' nivolumab will be a major market-driving event over the forecast period, with total sales expected to reach \$1.75 billion across the major markets in 2022.

Source: GlobalData, PharmaPoint: Non-Small Cell Lung Cancer Global Drug Forecast and Market Analysis to 2022

▼ For more information, visit [globaldata.com](http://globaldata.com).

## CARDIOVASCULAR

The dyslipidemia market will grow to just more than \$31 billion in 2022, at an annual rate of 2% from 2012. The launch of antidyplipidemic agents from two novel drug classes — PCSK9 and CETP inhibitors — will be the primary drivers of market growth, off-setting the genericization that has and will continue to impact the market through 2022.

Source: Decision Resources, Pharmacor Venous Dyslipidemia

▼ For more information, visit [decisionresources.com](http://decisionresources.com).

The venous thromboembolism (VTE) primary prophylaxis and treatment will grow to \$7.3 billion in 2022. Bayer/Janssen's Xarelto will be the sales-leading therapy among the novel oral anticoagulants in the VTE markets.

Source: Decision Resources, Pharmacor Venous Thromboembolism

▼ For more information, visit [decisionresources.com](http://decisionresources.com).

Roche/Chugai's glycine transporter-1 inhibitor-bitopertin is expected to be the first approved treatment to address negative symptoms in schizophrenia following its forecasted launch in the United States and Europe (France, Germany, Italy, Spain, and United Kingdom) in 2016 and in Japan in 2017. As a first-in-class agent for the treatment of these prominent yet underserved symptoms of schizophrenia, bitopertin will garner nearly \$1.5

billion in major-market sales in 2022.

Source: Decision Resources, Pharmacor Schizophrenia

▼ For more information, visit [decisionresources.com](http://decisionresources.com).

## CNS

The overall pipeline for MS is strong, with multiple molecules of varying classes and targets across all stages of development. Of the 228 molecules in the MS pipeline, 112 are in the preclinical stage with many of these drugs targeting novel proteins or employing novel mechanisms of action.

Source: GBI Research, Multiple Sclerosis Therapeutics to 2019 - Treatment Diversification, Increasing Efficacy, and Pipeline Innovation Combine to Drive Growth

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

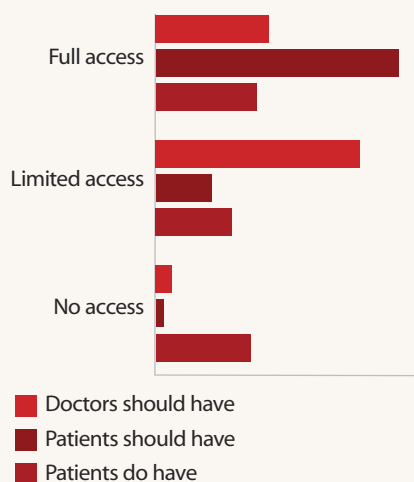
## DIABETES

The global type 2 diabetes market is expected to grow from \$20.4 billion in 2012 to \$38.8 billion by 2019, at a CAGR of 10.2%. The United States currently has the highest market share, which will rise from \$12.7 billion in 2012 to \$27.2 billion by 2019, at a CAGR of 11.6%, followed by the top five EU markets (the UK, France, Germany, Italy, and Spain), which will grow from \$4.5 billion to \$7.1 billion, at a CAGR of 6.8%.

Source: GBI Research, Type 2 Diabetes Market to 2019 - A Shifting Treatment Algorithm and Intensified Competition Expected to Drive Growth by 2019

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

## LEVEL OF PATIENT ACCESS TO ELECTRONIC MEDICAL RECORDS



Source: Accenture

ing among consumers and doctors," says Kaveh Safavi M.D., managing director of Accenture's North America health business. "Just as consumers can self-manage most other aspects of their lives, they expect to take greater ownership of their medical care, and they are willing to switch to doctors who share their values and are willing to provide access to consumer records."

▼ For more information, visit [accenture.com](http://accenture.com).

## MSLs Build RELATIONSHIPS WITH KOLS

Medical science liaisons (MSLs) are increasingly forming relationships with key opinion leaders (KOLs) who serve on reimbursement committees, according to a study by Cutting Edge Information.

The survey found that 67% of MSL teams build and maintain relationships with key decision makers on reimbursement committees. Increasingly, payer organizations, such as health insur-

ance companies, contract with KOLs to serve on committees or panels that determine reimbursement choices.

The data reveal that for most companies, these relationships make up a small percentage of the total KOL pool that MSLs target for building relationships. Interestingly, U.S. companies are less likely to have relationships with KOLs on these panels than in Canada or Europe. This is likely because many of those countries have more restrictive reimbursement policies.

"Key opinion leaders serving on reimbursement panels certainly have an increased interest in pharmacoeconomic data in addition to the usual presentations made by medical science liaison teams," says Ryan McGuire, research team leader at Cutting Edge Information. "Of course, market access teams are already responsible for working on reimbursement issues. MSLs must strike a delicate balance to not overstep their responsibilities. Still, market access teams request assistance from MSLs."

▼ For more information, visit [cuttingedgeinfo.com](http://cuttingedgeinfo.com). PV