

CASE STUDY

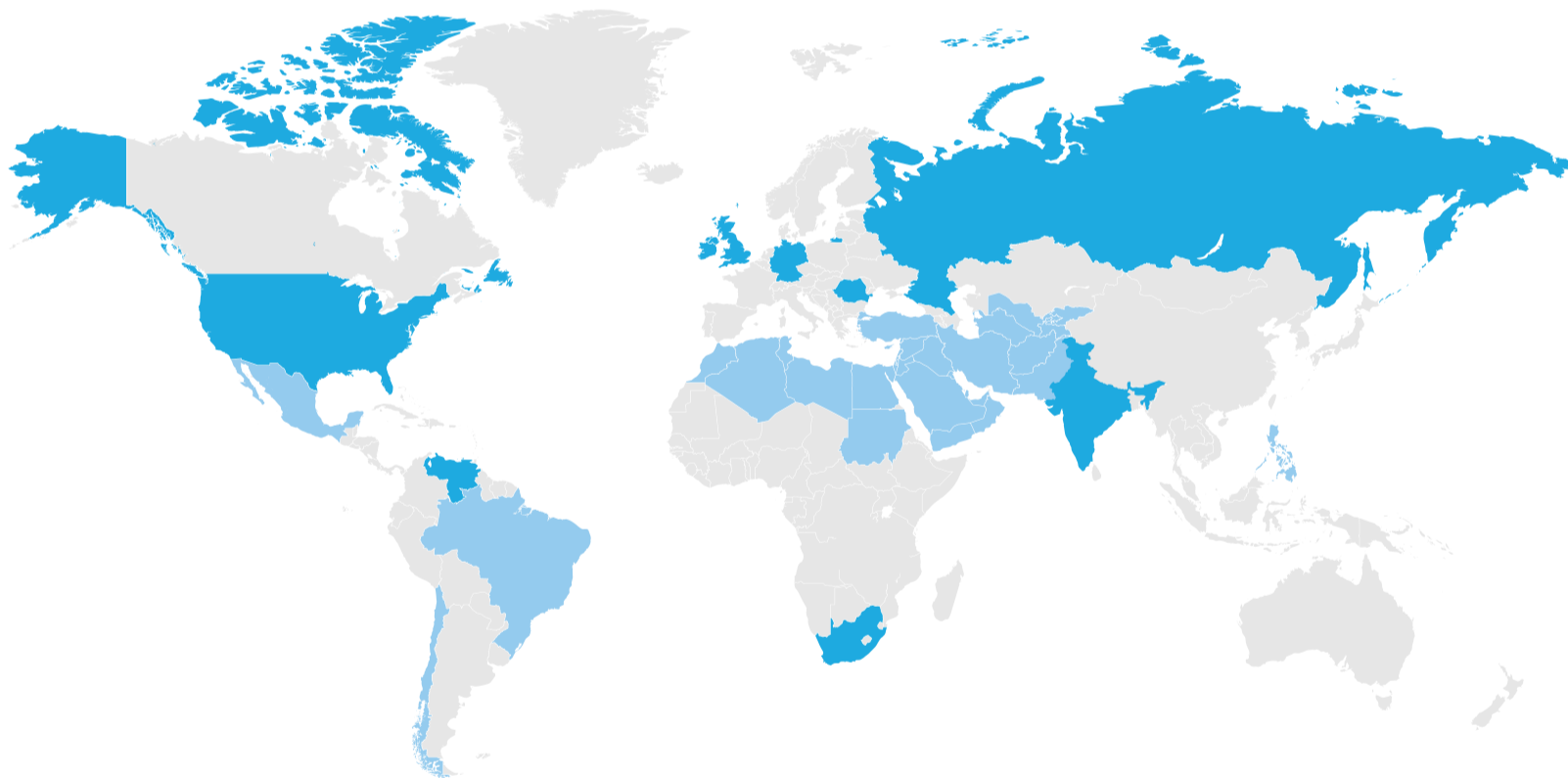
Healthcare

Market landscape analysis of migraine, pain, and Parkinson's disease



About the client

Our client is a leading pharmaceutical company that deals with a wide range of generic formulations, biologics, APIs, and other products for oncology, gastroenterology, pain management, dermatology, diabetes, and cardiovascular disease management.



■ Main operations ■ Operations through strategic alliances

Employee Size

21K

Headquarters

Hyderabad,
Telengana, India

Revenue

\$2.4B

(as of 2020)



Objective and scope

In order to facilitate their market entry and expansion plans, our client required in-depth insights into the market and treatment landscape for a variety of indications, including pain management, migraine, and Parkinson's disease, across locations spanning India, China, Brazil, Mexico, Colombia, Russia, Japan, Australia, and South Africa. Furthermore, they wanted to understand physicians' perceptions and acceptance levels for their products across these markets to enhance the impact of their messaging.

Solution and approach

Our client was able to understand the market and treatment landscape of specific therapeutic areas through a market landscape analysis conducted by Netscribes. This study involved a holistic analysis of the following:



Market and indication landscape



Feedback from relevant stakeholders



Regulatory and reimbursement environment



Estimated initial and peak sales of new products in the target markets

1. Understanding the market and indication landscape in each country

To gain an in-depth overview of each region's market and indication landscape, we leveraged secondary information sources such as industry journals, company websites, client's in-house records, clinical trial databases, IQVIA data, drug development databases, industry articles, and regulatory and competitive information.

2. Gathering information from relevant stakeholders

Netscribes used Computer-Assisted Telephone Interviewing (CATI) to conduct in-depth interviews and capture responses from a select group of stakeholders, including patients and physicians. Extensive desk research was carried out to obtain the information needed to develop the questionnaire, which included both qualitative and quantitative questions. After this, the survey was programmed.

A total of 275 interviews were conducted across predetermined countries, with interview lengths ranging from 10 minutes for patients to 1 hour 45 minutes for physicians. The following were among the target groups:



Patients with the symptoms (migraine and chronic pain), as well as caregivers of Parkinson's disease patients



Neurologists, migraine consultants, movement disorder specialists, pain specialists, dentists, etc.



Rheumatologists, orthopedic surgeons, and other specialists



Pharma vendors and logistics teams in hospitals



Personnel from the regulatory or government sectors



Results delivered

For each therapeutic area, Netscribes provided the client with a report that offered an in-depth view into the following:

Market knowledge for each region: Regulatory procedures by drug category, reimbursement scenarios, pricing patterns, and predicted sales, as well as peak sales forecasts

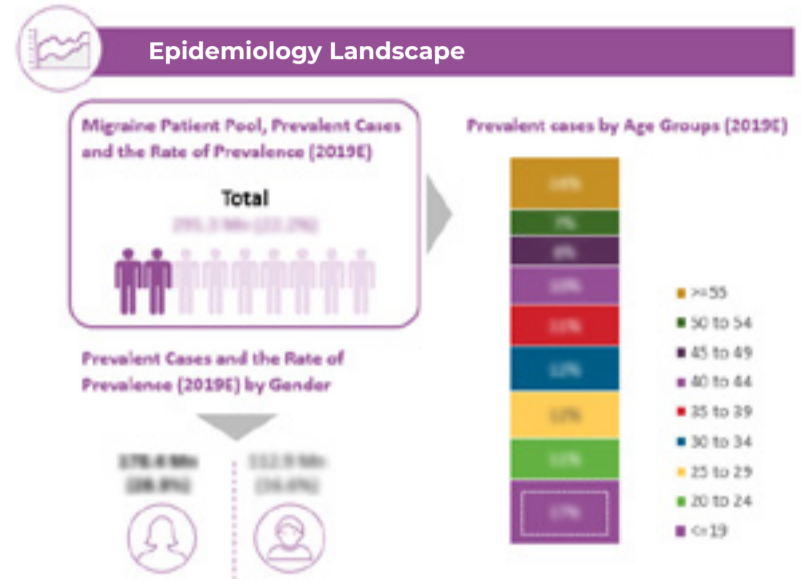
Rising cases of Migraine in India (2009 – 2019E)



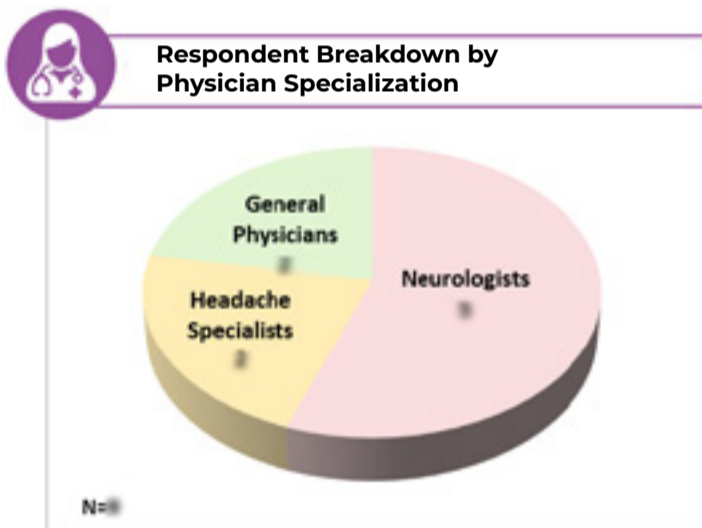
Migraine cases in males and females (2019E)



Indication landscape: This included epidemiological data, market trends of treatment options, pipeline analysis, competitive intelligence, and distribution data



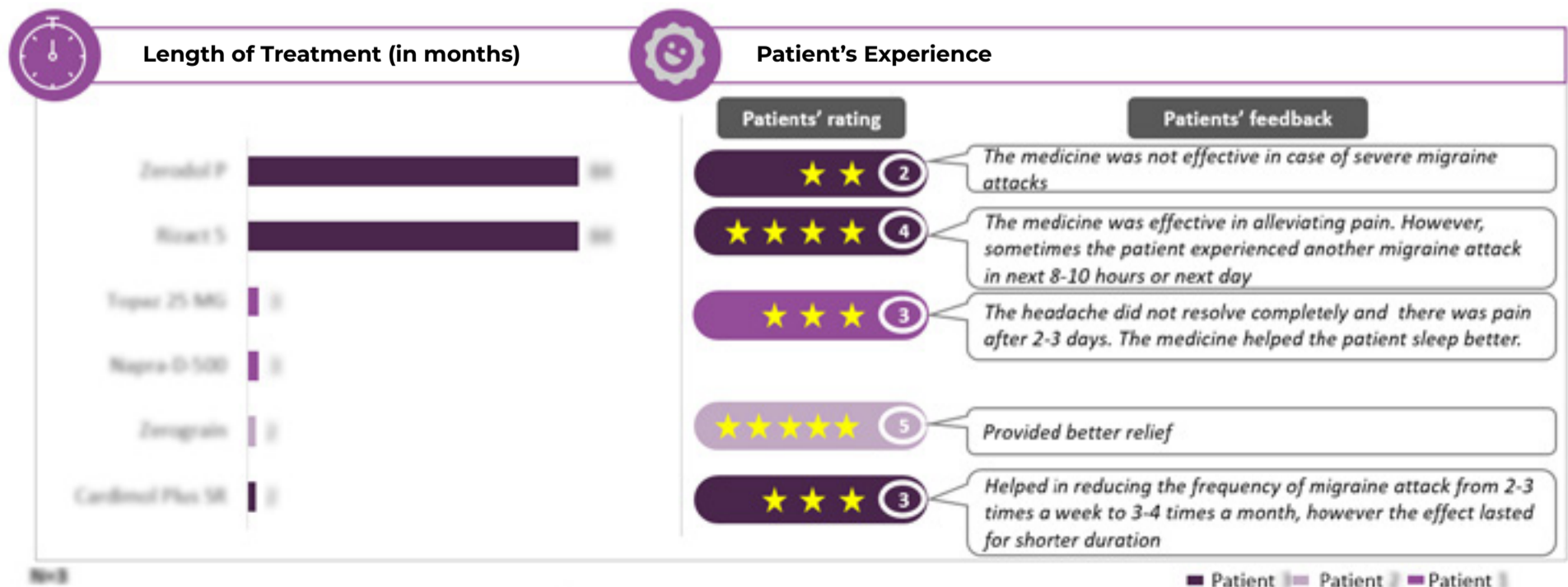
Physician perception: Physician viewpoints regarding diagnostic and therapeutic protocols

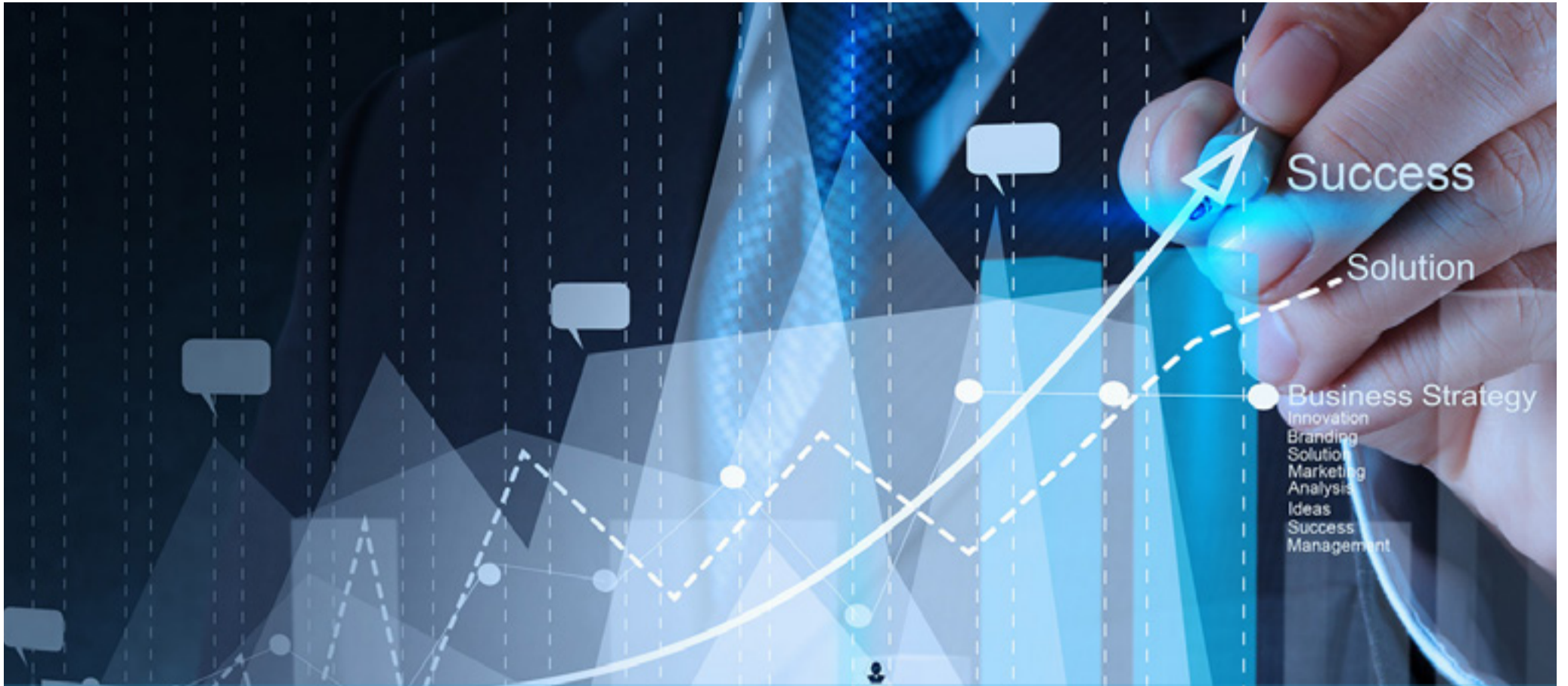


	Healthcare Organization	Number of Migraine Patients Per Month
Neurologist 1	Private Hospital	400
Neurologist 2	Private Hospital, and Personal chamber/clinic	300
Neurologist 3	Private Hospital	150
Neurologist 4	Government hospital	50
Neurologist 5	Private Hospital, and Personal chamber/clinic	150
Headache Specialist 1	Private Hospital	70
Headache Specialist 2	Private Hospital	300
General Physician 1	Private Hospital, and Personal chamber/clinic	50
General Physician 2	Personal chamber/clinic	50

Patient journey insights: This provided the patient's perspective starting from when they begin to experience initial symptoms, diagnosis (including self-diagnosis), treatment regime (OTC and Rx), treatment effectiveness, expectations, insurance coverage, etc.

Treatment Pathway – First-line Treatment





Benefits

With these insights, our client was able to gain a thorough understanding of the markets they were about to enter and plan their discussions with influencers, health economics experts, and pharmacoeconomics experts about rolling out Patient Assistance Programs and increasing patient access. The research also enabled them to identify new products that would yield greater sales in the near future and optimize their strategies accordingly.

Uncover the most profitable opportunities and meet your strategic needs for effective decision-making with [Netscribes market intelligence services](#)

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