



Migraine Prevention (US)

OVERVIEW

Migraine is a complex neurological disorder that is characterized primarily by recurrent attacks of moderate-to-severe pulsating headache pain which can be episodic (<15 migraine days/month) or chronic (≥15 migraine days/month). Current migraine management encompasses both acute control of attacks as well as the prevention of migraine days. With the May approval of Amgen/Novartis' Aimovig, an anti-CGRP monoclonal antibody (mAb), quickly followed by the approval of two additional anti-CGRP mAbs, Teva's Ajovy and Eli Lilly's Emgality, migraine prevention options have expanded substantially, setting up a highly competitive market. With three additional preventive therapies in the late-stage pipeline, the complexity of therapy selection will continue to intensify.

RealTime Dynamix™: Migraine Prevention (US) provides a close-quarters analysis of key performance metrics, focusing on brand gains and losses, industry contact rates, familiarity and adoption rates of recently launched products, and awareness of products in development. Product perceptions, disease awareness and attitudes, practice management, and other topics are rotated throughout the year to provide a regular review of the crucial drivers of change. This ongoing, independent insights series allows marketing professionals to keep abreast of and quickly react to market changes by providing critical information that will support their commercial strategies in the migraine prevention space.

SAMPLE & METHODOLOGY

Each quarter, ~100 US neurologists/migraine specialists provide their responses to an online survey. Respondents are recruited from the Spherix Network, a proprietary group of clinical health care professionals meeting our strict screening criteria. Our relationship with this network leads to more engaged respondents resulting in higher quality output. Additionally, this gives us the opportunity to more easily revisit physicians in order to uncover even more insight on strategically important findings.

KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for the migraine prevention market evolving?
- What are the critical opportunities and barriers for growth for each brand?
- To what degree do clinicians have strong preferences for specific preventative migraine brands? How are the brands delivering on key attributes and typical patient types?
- How has the launches of Aimovig, Ajovy, and Emgality impacted the migraine prevention market?
- To what degree are the new launches growing the migraine prevention market versus stealing share from existing products?
- How often are patients requesting specific brands for migraine prevention?
- What is the impact of insurance coverage on influencing migraine preventive therapy selection?
- What are neurologists' perceptions of late-stage pipeline assets and how do they anticipate incorporating these preventive products into their migraine treatment?

Products Profiled

Commercial Products

Allergan (Botox), Amgen/Novartis (Aimovig), Eli Lilly (Emgality), Teva (Ajovy)

Pipeline Agents

Alder (eptinezumab), Allergan (atogepant), Biohaven Pharma (rimegepant)

Key Dates

- Q1 March
- Q2 July
- Q3 September
- Q4 December

Note: a three day embargo is placed on delivery to non-manufacturers allowing clients time to digest the findings before public dissemination

Deliverables

- PowerPoint report
- Frequency table & summary statistics
- On-site presentation
- Proprietary questions (for purchasers of the annual series)

Related Reports

- *RealWorld Dynamix™: Anti-CGRP Monoclonal Antibody Uptake US*
- *RealTime Dynamix™: Multiple Sclerosis US*
- *RealTime Dynamix™: Multiple Sclerosis EU*
- *RealWorld Dynamix™: DMT Switching in Multiple Sclerosis US*
- *RealWorld Dynamix™: DMT New Starts in Multiple Sclerosis US*
- *RealWorld Dynamix™: Progressive Forms of Multiple Sclerosis US*