

# AnswersOn...

**Migraines** are an intense and sometimes debilitating type of headache that cause throbbing head pain.

The pain is often on one side of the head but can affect both sides. Sufferers may also experience nausea, vomiting, dizziness and extreme sensitivity to sound, light, touch and smell. Migraines can last **hours** or, for some sufferers, even **days**.

Migraine (ICD-10 G43) accounted for **10.1M visits** to office-based HCPs, in the 12 months ending March 2019.

In the twelve months ending March 2019, **physicians reported** the following regarding office visits with their migraine patient population:



### MAJORITY OF PATIENTS ARE WOMEN

Majority of patients are female with **only 20.9%** male



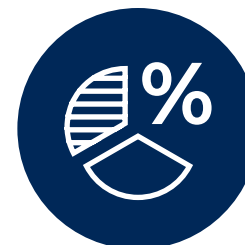
### AVERAGES 2.3 OFFICE VISITS PER YEAR

Migraine patients visited their HCP on average **2.3 times/year**



### TYPICALLY TREATED WITH A PRESCRIPTION

**89.0%** of patient visits to an office-based HCP resulted in a **prescription** for drug therapy



### TYPICALLY AN INDEPENDENT CONDITION

**70.7%** of patients' visits present to HCPs with only the diagnosis of migraine, with **no other comorbid conditions**

## BIOPHARMACEUTICAL COMPANIES

Three new biologic medications, indicated for the preventative treatment of migraines, were launched in 2018. These brands include

### PRODUCT A, PRODUCT B AND PRODUCT C

and are considered a new option in condition management. Detail activities and samples to HCPs have been tracked to determine the share of voice among the three competitive brands.

In the month of March 2019, Syneos Health® reported Product B held the number one spot in details to HCPs with **28.6% share of voice**. However, it was Product C who was the leader in the number of sample extended units provided to HCPs with

**35.4%**  
OF THE MARKET.

Product B made a push in March 2019, with an increase in samples of **208.5%** over the previous month.

Note: Migraine diagnosis was defined as ICD-10 G43.



## IN THE MIGRAINE MARKET

### Share-Of-Voice Performance Tracking

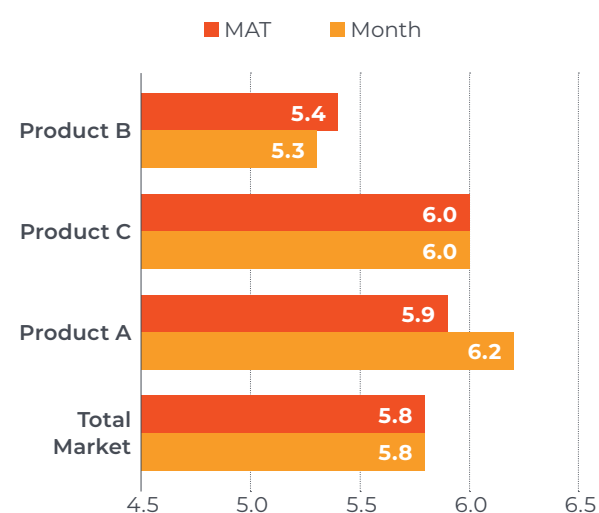
Product A	Product B	Product C
<b>DETAILS</b>		
SOV: 24.3%	SOV: 28.6%	SOV: 28.5%
Change: 61.9%	Change: 79.8%	Change: 27.5%
<b>SAMPLES</b>		
SOV: 28.7%	SOV: 25.3%	SOV: 35.4%
Change: -57.7%	Change: 208.5%	Change: -35.2%

Source: Syneos Health® *DetailAnswers* and *SampleAnswers* Audits (March 2019)

Note: percent change is current month compared to prior month.

**Product A** was considered the highest rated brand by surveyed physicians in terms of detail uniqueness, relevance and believability in March 2019.

### Detail Ratings - Uniqueness, Relevance & Believability (Scale 1 = Low, 7 = High)



Source: Syneos Health® *DetailAnswers* Audit (March 2019)

### Syneos Health AnswerSuite™

Syneos Health Syndicated Market Research & Insights utilizes a physician panel of more than 10,000 healthcare providers and close to 30 years of ongoing data collection. The AnswerSuite from Syneos Health offers one of the most robust medical and promotional audits in the industry.

**TreatmentAnswers** is a monthly survey of 3,200 physicians, across 30 specialties, monitoring patient diagnoses and physician intended drug and non-drug therapy. This audit offers unique insight into physician and NP/PA diagnosis visits, prescribing habits and associated physician and patient demographic metrics.

**PromotionalAnswers** is a comprehensive syndicated data resource covering personal (detailing, events, ePromotion and sampling) and non-personal (HCP journal and consumer DTC) promotion activities across the pharmaceutical industry. Personal promotion is based on monthly surveys with healthcare providers, across 32 specialties, while non-personal promotion is provided through a partnership with Kantar Media. This relationship also powers the Ad Browser from Syneos Health, a full library of print and video ads.

To learn more about our Syndicated Market Research & Insights services, please contact Angelica Girone at [angelica.girone@syneoshealth.com](mailto:angelica.girone@syneoshealth.com).