

Asthma Market

In the year 2021, healthcare providers reported the following regarding their asthma patient population:

Asthma patients were

11.3%

more likely to receive a drug prescription in 2021 versus 2020. In 2021, 94.8% of office visits resulted in a prescription being written versus only 85.2% the previous year.

The percentage of office visits with a drug request remained consistent YoY; however, HCPs were

26.9%

more likely to grant a drug request for an asthma brand than in 2020. In 2021, 74.7% of patient requests were granted, versus only 58.9% in 2020.

Though overall office visits with an asthma diagnosis decreased by 3.4%, asthma visits by African Americans increased by

9.5%

during the same time period.

There were no concomitant diagnoses in

82.1%

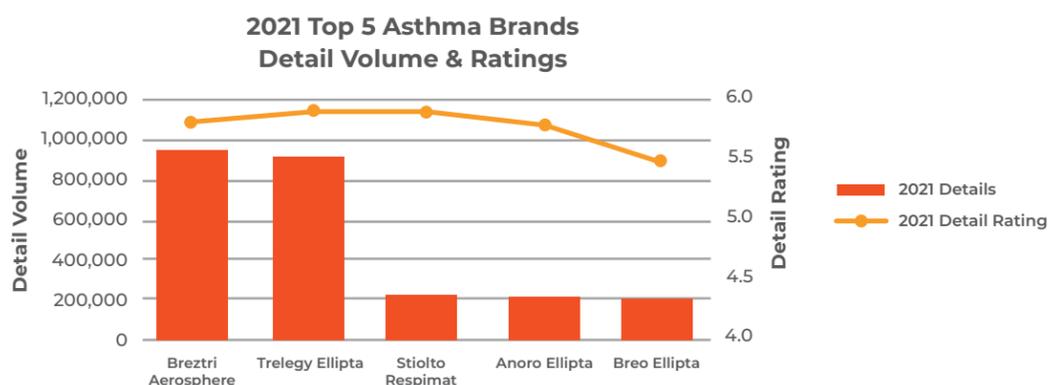
of office visits for asthma. Vasomotor and allergic rhinitis (ICD-10 code J30) was the most reported concomitant diagnosis with 2.6% of office visits.

The mean number of office visits per year increased slightly since 2020, from 2.1 to 2.3. This may have been influenced by the decrease in in-office visits in 2020 due to the pandemic.

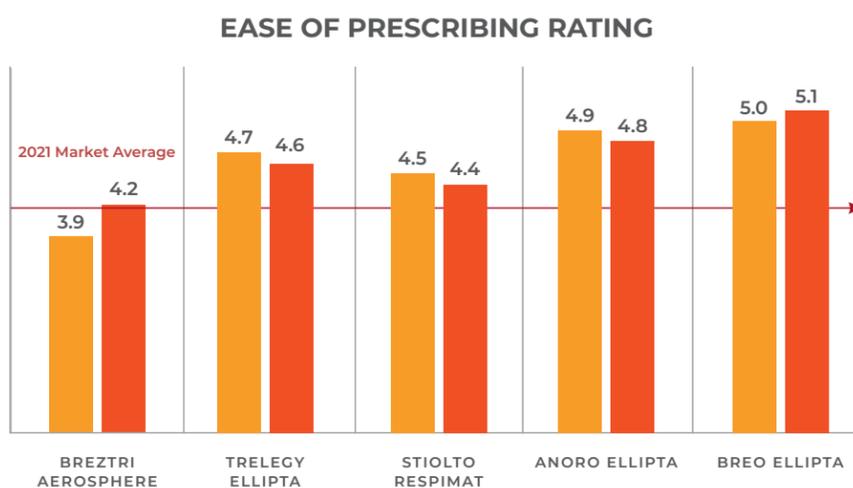
Biopharmaceutical companies **spent \$799M on personal detailing of asthma brands in 2021.**

Healthcare providers reported the following:

- The top 5 detailed brands of 2021 were Breztri Aerosphere, Trelegy Ellipta, Stiolto Respimat, Anoro Ellipta and Breo Ellipta. These brands accounted for 62% of asthma market details in 2021.
- Trelegy Ellipta and Stiolto Respimat both earned the top detail rating of 5.9, in terms of uniqueness, relevance and believability, on a scale from 1 through 7 (1 = not at all; 7 = very). The market average was a rating of 5.8 in 2021.



- On a monthly basis, HCPs rate how easy or difficult it is to prescribe products based on managed care influences on a scale from 1 through 7 (1 = very difficult; 7 = very easy). Of the top 5 detailed brands of 2021, Breo Ellipta continued to have the highest ease of prescribing rating with 5.1. Breztri Aerosphere is below the market average rating of 4.6; however, it increased from 3.9 in its launch year of 2020 to 4.2 in 2021.



Source: AnswerSuite TreatmentAnswers; AnswerSuite DetailAnswers

*Asthma defined using diagnosis code ICD-10 J45.

Reach out to one of our AnswerSuite experts for a complimentary report.

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AnswerSuite a Syneos Health Company provides a Proprietary syndicated Market Research Solution that utilizes a panel of thousands of healthcare providers over a 30-year period. AnswerSuite is consumed by the Biopharmaceutical industry with insights delivered through a SaaS platform or with full service from analysts.

TreatmentAnswers captures and reports on patient visit interactions with HCPs. These insights include patient and HCP demographics, diagnoses, comorbidities and intended drug therapy.

PromotionalAnswers tracks and monetizes promotional activities such as detailing, events, virtual engagements, and sampling. Through partnerships, professional journals and DTC advertising are also tracked.

Custom Insights supports different use cases through a unique proprietary survey. Custom Insights answer a multitude of questions such as: What is the HCPs awareness of your brand and competitors? What is the message recall of your brand and competitor? What is the share of voice among HCP targets and non-targets? The quick studies supplement why the actions are being taken and inform multiple business strategies.