Overactive Bladder | Treatment Algorithms | Claims Data Analysis | US | 2015

Overactive bladder (OAB) is a common symptom complex characterized by urinary urgency, incontinence, frequency, and nocturia, which occur in the absence of pathologic or metabolic factors that could otherwise explain such symptoms. OAB is estimated to affect 43 million adults, although only 36% of prevalent cases are diagnosed. Nonpharmacological and pharmacological treatment approaches aim to reduce urinary symptoms and improve patients’ quality of life. Pharmacological treatments include antimuscarinic therapies (oral oxybutynin [generics], Astellas Pharma’s Vesicare [solifenacin succinate]); eight such therapies are approved to treat OAB in various oral, topical, or patch formulations. The competition for OAB patient share has increased following the launch of more-tolerable generic options (tolterodine tartrate), as well as new agents with novel mechanisms of action, including the first-in-class beta3 adrenergic receptor agonist Astellas Pharma’s Myrbetriq (mirabegron) in 2012 and Allergan’s injectable neurotoxin Botox (onabotulinumtoxinA) in 2013. Using national patient-level claims data, Treatment Algorithms in Overactive Bladder explores the use of key therapies and drug classes among newly diagnosed and recently treated OAB patient populations. In the case of newly diagnosed patients, we provide a quantitative analysis of percentage drug-treated and time to treatment, treatment patterns and share by line of therapy, progression between lines, recent patient-share trends, and use of concomitant treatment. For recently treated patients, we quantify a drug’s overall drug share, use in combination with other therapies, and source of business compared with its competitors, detailing which drugs precede others through an analysis of add-versus-switch patterns. Two additional claims database queries explore persistency and compliance by therapy.

Questions Answered in This Report:

- Newly diagnosed patients: Only one-third of newly diagnosed OAB patients initiate pharmacotherapy with an OAB treatment within the first year of diagnosis. What percentage of these patients progress to a second- or third-line drug within the first year, and how quickly do patients progress? Which products capture the most patient share in the first, second, and third lines of treatment? How have the market entries of Myrbetriq and Botox affected treatment patterns among newly diagnosed OAB patients?

- Recently treated patients: In Q3 2014, the use of antimuscarinic agents dominated the OAB treatment landscape. Which specific drugs garner the most patient share for recently treated OAB patients? Have any therapies experienced market growth or decline over the key therapy periods studied?
Pathways to key therapies: Among patient-share leaders for OAB, oral oxybutynin and Vesicare are the most likely treatments to precede other agents, consistent with these drugs' leading position in early lines of therapy. How long does it take OAB patients to progress to each key therapy? What are the various sources of business for each agent (i.e., new, add/switches, or continuing business)?

Scope:

Primary patient-level data: This report provides quantitative findings from our analysis of data covering approximately 40 million lives and provides the most representative sample of U.S. treatment practice for Medicare and commercially insured patients. This report is delivered as a key findings slide deck and a dashboard that can be accessed using the Internet and presents claims that are 6-12 months old at time of publication.

Patient Sample: Patients who are continuously enrolled for the complete two-year study period must meet the following condition: at least one claim with a diagnosis code for OAB (International Classification of Diseases, Ninth Revision [ICD-9] diagnostic code: 596.51) during the study period. All patients must be aged 18 or older to qualify.

Newly diagnosed patients:
- Patient share by drug class and key products across three lines of therapy, within one year of diagnosis.
- Patient flowcharts through one year of treatment for all first-line products, including progression rates and add/switch behavior.
- Polypharmacy and key concomitant therapies by line of therapy.
- Quarterly trending of patient share by line of therapy.

Recently treated patients:
- Quarterly snapshot of patient share by drug class and key products.
- Pathway to key therapy flowcharts tracking the preceding therapy patterns for all key therapies, including add/switch behavior.
- Brand source of business including share for continuing, new (switches/adds), and new (initial therapy) business.
- Polypharmacy and key concomitant therapies.
- Quarterly trends in patient share for all key therapies.

Drug persistence (One year, all-brand).

Drug compliance (six-month medication possession ratio [MPR]).

Report Details
- Pub Date: August 2015