

PATIENTS IN FOCUS:

Asthma treatment & perceptions



Phreesia

Life
Sciences

Table of contents

Executive summary.....	3
Introduction.....	4
Building biologics awareness	5
Strengthening messaging around asthma severity.....	6
Addressing concerns about new medications	7
Continuing physician outreach	8
Recommendations for drugmakers	9



Executive summary

Proper asthma treatment can help patients manage their symptoms and ward off attacks, and between inhaled corticosteroids, beta agonists, combination therapies, biologics and more, there's no shortage of available options on the market. Still, many patients don't have their asthma under control, and symptoms such as wheezing, coughing and shortness of breath may disrupt their daily lives.

Those symptoms are most apparent among patients with severe asthma, whose quality of life and mental and emotional well-being often suffer along with their breathing. And while new biologic treatment options aimed at subsets of this group have proliferated in recent years, most patients haven't heard of them.

Although marketers clearly need to do more to get the word out, there's good news for drugmakers: Asthma patients are ready and willing to try new therapies and to actively participate in treatment conversations with their doctors. And that willingness opens up opportunities for pharma marketers to directly and effectively engage patients.

Using Phreesia PatientInsights survey results collected in September 2021 from 5,598 asthma patients checking in for their doctors' appointments, this report will explore why more patients aren't trying new asthma treatment options that have the potential to alleviate their symptoms—and how pharma marketers can reach them.

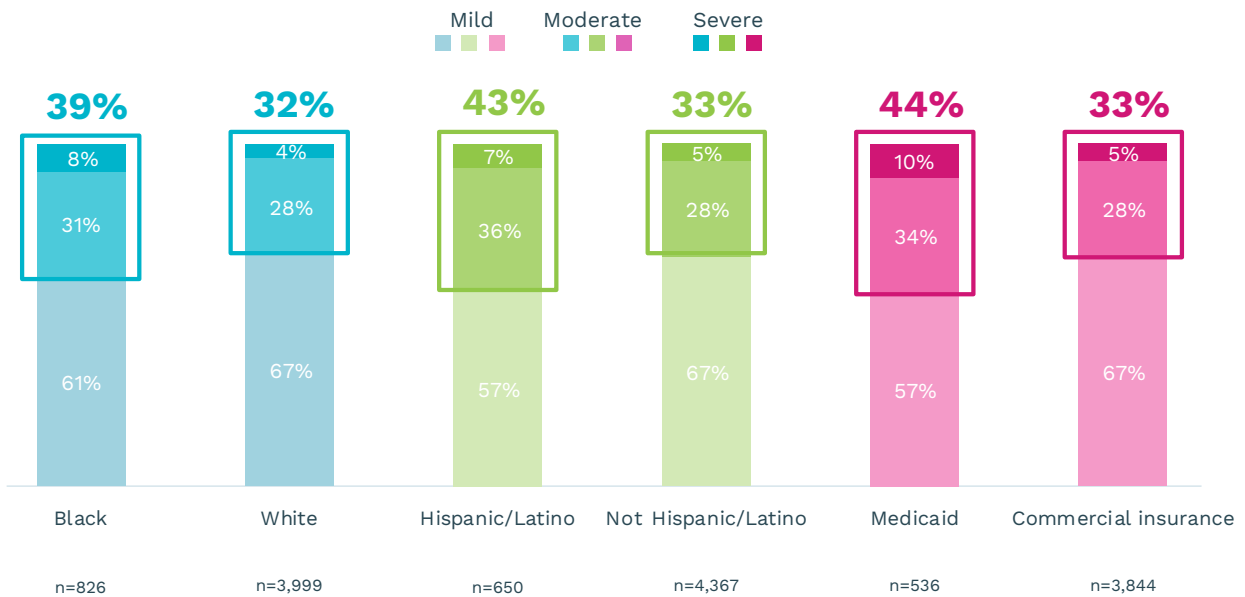
Introduction

About 25 million Americans have asthma, making it one of the most common—and costly—chronic health conditions in the country. In 2018 alone, the disease accounted for 5.8 million doctor’s office visits in the U.S. and 1.6 million emergency department visits.¹

But the costs of asthma go beyond its clinical expense. In 2013, researchers pegged the total cost of asthma in the U.S. at \$81.9 billion, including \$3 billion in losses from patients’ missed work and school.²

Asthma takes an undeniable toll on patients’ lives. Two-thirds (67%) of surveyed patients with moderate asthma said their condition negatively impacts their quality of life, and nearly half (46%) said it affects their emotional and mental health. Among patients with severe asthma, those figures soared to 90% and 72%, respectively. In addition, underserved patient populations tend to suffer disproportionately: 39% of Black patients, 43% of Hispanic/Latino patients and 44% of patients on Medicaid described their asthma as moderate-to-severe, compared to 34% of patients overall.

Would you say your asthma is mild, moderate or severe?

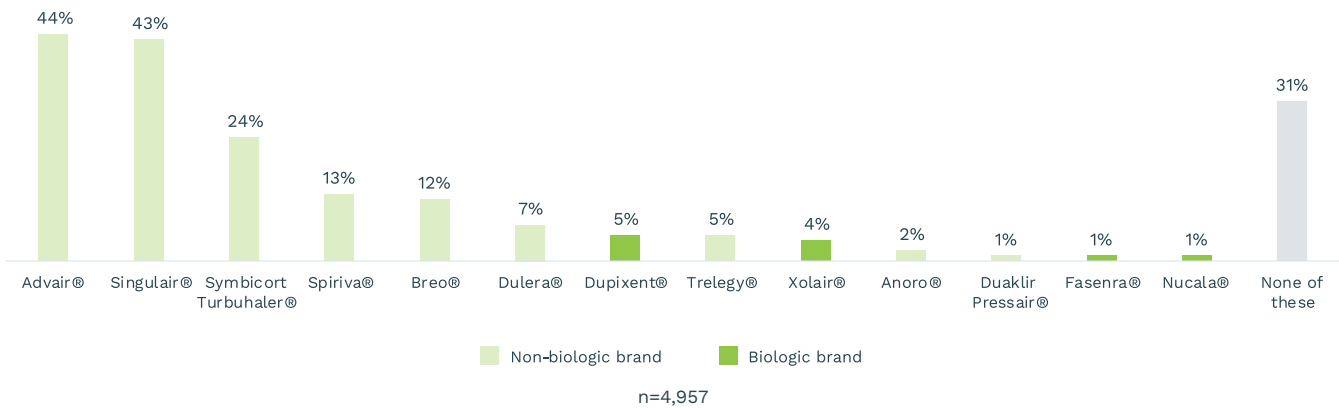


Thanks to a spate of Food and Drug Administration approvals between 2015 and 2021, five more new biologic therapies have come on the market that are approved for certain patients with moderate or severe asthma, and more are on the way. But while patients are open to new asthma medications—57% say they’re likely to try a new treatment—they’re generally unaware of their biologic options.

Building biologics awareness

Pharma marketers have their work cut out for them to expand patient awareness and education on biologic asthma treatments. Only 5% of surveyed patients had heard of Sanofi and Regeneron’s Dupixent, which led recall among surveyed biologic brands. Novartis’ Xolair was familiar to 4% of patients, while GlaxoSmithKline’s Nucala and AstraZeneca’s Fasenna were each recognized by just 1% of patients.

Which of the following brands come to mind for asthma?

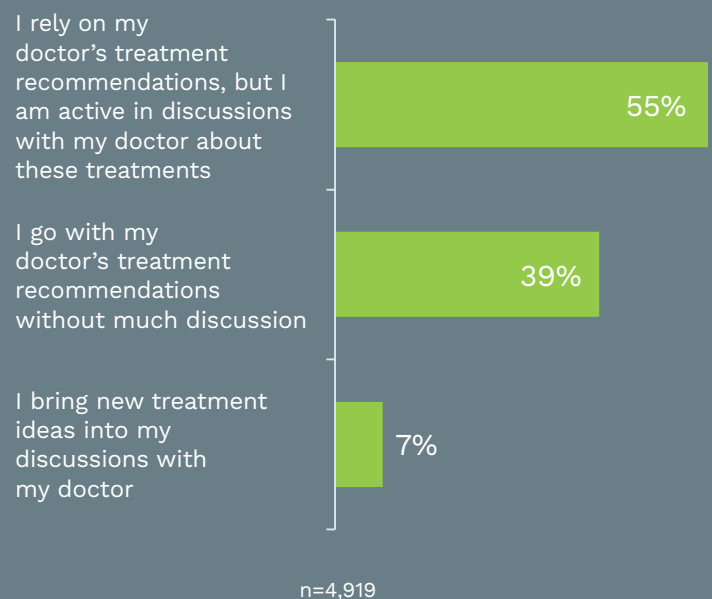


However, there’s a bright spot for marketers: Asthma patients are ready and willing to hear about new treatment options, and beyond that, they’re ready and willing to talk to their doctors about them.

Among surveyed patients with moderate or severe asthma who had not tried biologics, 62% said they were likely to try them. And when asked why they hadn’t yet tried a biologic, 58% of patients with severe asthma who used long-acting inhalers said they hadn’t heard of them, citing lack of awareness as their top reason for not trying biologic treatments.

Meanwhile, nearly two-thirds of patients (62%) reported that they either bring up new treatment ideas with their doctor, or engage in active discussions with him or her about their asthma management options. Conversely, only 39% of patients said they follow their doctor’s treatment recommendations without much discussion.

Which of the following best reflects your involvement in asthma treatment discussions with your doctor?



These results point to a key opportunity for pharma marketers—direct patient education about biologics. Empowering patients with the latest information about all of their asthma management options is critical for a group that actively participates in treatment discussions with their provider. Marketers who can reach patients right before those provider discussions—with point-of-care education, for example—will be best-positioned for success.

Strengthening messaging around asthma severity

Another possible reason for low biologics use: Patients may be hesitant to try asthma treatments typically reserved for sicker patients. When asked why they hadn't tried long-acting asthma medications, 38% of patients who hadn't tried long-acting inhalers or biologics said their asthma wasn't severe enough to require such medications.

What symptoms of asthma are you currently experiencing?

Value	Percent
Shortness of breath	43%
Wheezing	34%
Frequent coughing	28%
Throat irritation	21%
Waking up at night with difficulty breathing	16%
Frequent respiratory infections	8%
None of these	38%

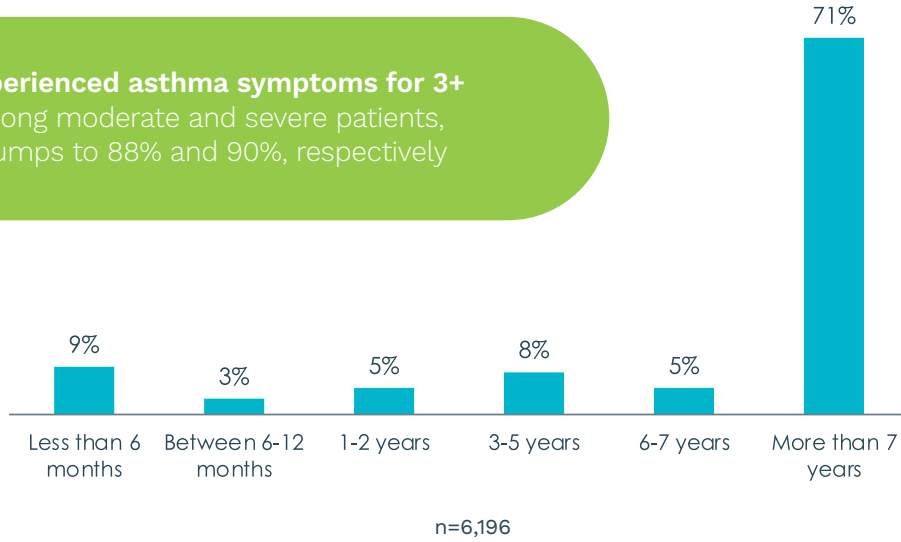
Responses from patients who have not tried long-acting inhalers or biologics
n=4,759

But symptom data paints a potentially different picture. When asked what asthma symptoms they were currently experiencing, 43% of surveyed patients who hadn't tried long-acting inhalers or biologics cited shortness of breath; slightly more than 34% reported wheezing; and 16% said they woke up at night with difficulty breathing, suggesting that many of these patients' current treatments are not adequately controlling their disease.

And for many patients, that problem may not be a new one. Some 88% of patients with moderate asthma and 90% of patients with severe asthma said they have experienced their symptoms for three or more years—an indication that they might benefit from a new or stronger treatment.

How long have you experienced asthma symptoms?

84% have experienced asthma symptoms for 3+ years, and among moderate and severe patients, that number jumps to 88% and 90%, respectively

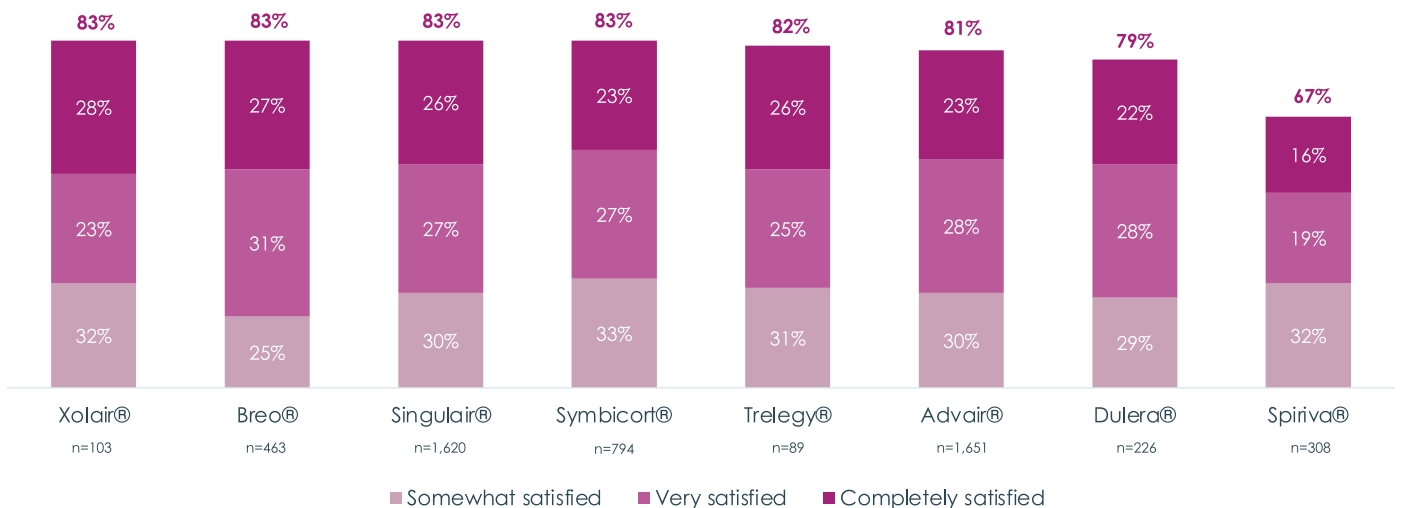


Pharma companies can combat the notion that biologics are only appropriate for very ill asthma patients by creating content that clearly outlines the symptoms that might make a patient a good candidate for a biologic asthma medication. That educational content also should emphasize that patients with the symptoms described don't have to suffer through them.

Addressing concerns about new medications

Nearly across the board, patients reported that they were satisfied with their current asthma treatment, with all but one brand included in the survey registering a satisfaction rate at or above 79%.

Among those on treatment, how satisfied are you with these medications for asthma?

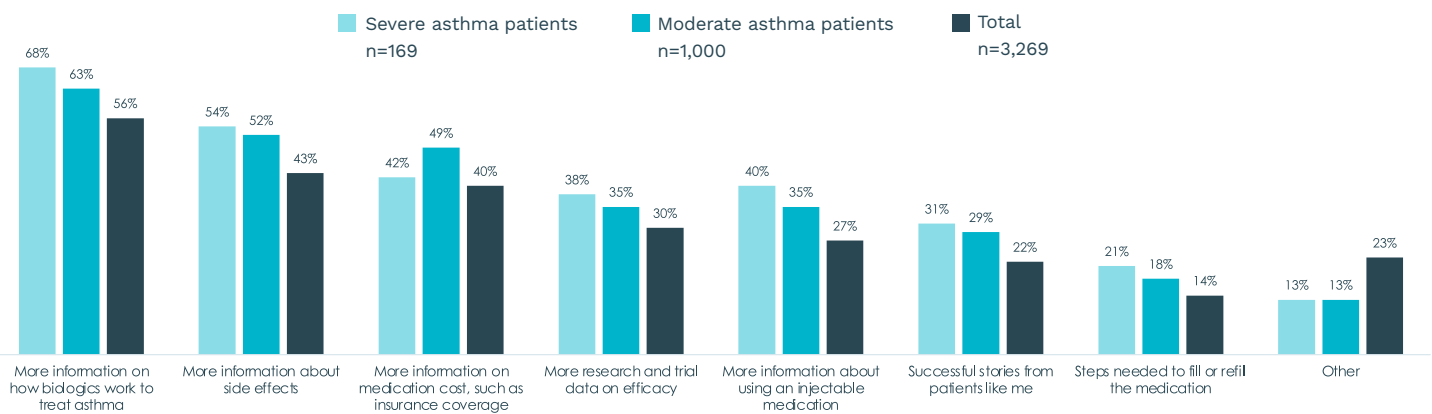


But for many patients, that doesn't necessarily mean that their medication is working as well as other options might. Patients reported that their asthma symptoms impact their daily lives an average of 5.3 days each month, and more than a quarter of patients (27%) experience asthma symptoms for more than a week each month that affect their day-to-day activities. For 14% of patients, those symptoms have even hindered their ability to work.

Still, patients may feel inclined to stick with a suboptimal asthma treatment rather than trying one they're unfamiliar with, especially if that new medication differs significantly from options they've tried in the past.

Drugmakers can help ease patients' concerns about trying biologic treatments by providing them with more information—specifically, information on how biologics work to treat asthma, which was the top-requested (56%) patient resource in the survey. Additionally, 43% of patients said more side-effect information would increase their interest in trying a biologic, and 40% wanted to know more about the cost of biologics in weighing their treatment options. Many patients also said they would welcome assistance in understanding how to fill a biologics prescription.

What information below will help increase your interest in a biologic medication for asthma before trying? Please check all that apply.

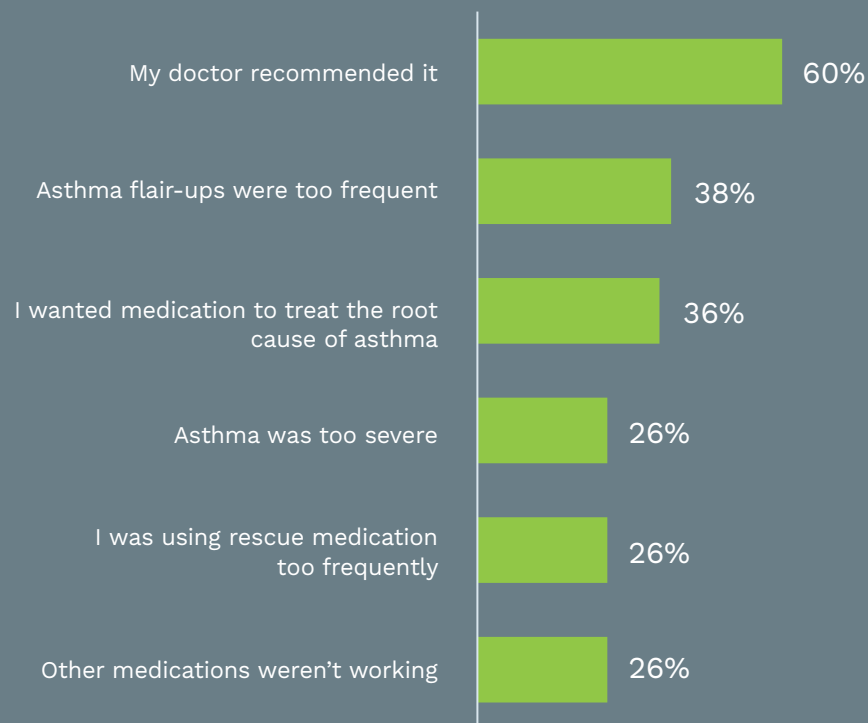


Continuing physician outreach

While patients play a key role in determining their course of asthma treatment, pharma cannot overlook the importance of physician-patient discussions. Patients who have tried biologics said their doctor was their most motivating influence, with 60% of patients attributing their decision to start a biologic asthma treatment to their doctor's recommendation.

Most significantly, every surveyed patient who reported discussing biologics with his or her doctor ultimately tried a biologic asthma treatment, underscoring patients' trust in their doctors and the power of a doctor's advice when patients want to explore new treatment options.

What are the main reasons you started a biologic treatment for your asthma? Please check all that apply.



Among patients who have tried biologics n=136

Recommendations for drugmakers:

- ✔ Empower patients with direct education about asthma treatment options, ideally right before their medical appointments, when they're eager to participate in shared decision-making with their doctor
- ✔ Clearly convey the symptoms of moderate and severe asthma in their messaging and point out which symptoms might make an asthma patient a good candidate for a biologic therapy
- ✔ Address patients' concerns about new asthma medications with resources specifically tailored to biologic-naïve patients that describe how biologics work, as well as their side effects
- ✔ Continually educate doctors about the benefits of biologic asthma therapies and encourage them to recommend biologics to their clinically appropriate patients

About Phreesia Life Sciences

Phreesia empowers life sciences companies to connect meaningfully with clinically relevant patients, delivering targeted health content in a one-to-one setting. Our PatientConnect offering identifies and motivates the right patients to initiate meaningful brand conversations, and our PatientInsights product enables our clients to better understand their target patient populations.

Phreesia meets patients where they are, both virtually and in-person, and reaches them at multiple touchpoints throughout their healthcare journey.

To learn more about Phreesia Life Sciences, visit lifesciences.phreesia.com

End notes

1. "[FastStats—Asthma](#)," Centers for Disease Control and Prevention, 2018.
2. "[Asthma Facts and Figures](#)," Asthma and Allergy Foundation of America.

