

Rare Disease Stakeholder Dynamics - 3 Key Insights

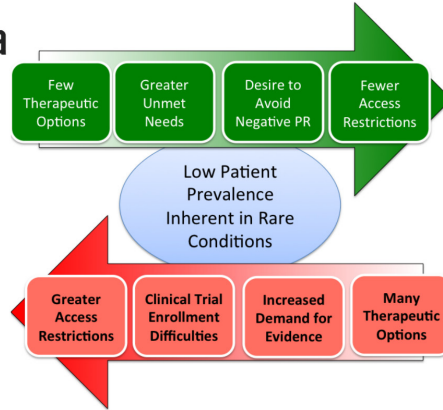
Olson Research Group and Currant Insights recently partnered to better understand rare disease stakeholder dynamics. Our exploratory research initially focused on three rare conditions purposely selected to represent markets with few, several and many therapeutic options. Results from this qualitative research were presented at the 2014 PMRG Institute.

Using Olson's robust provider database, we subsequently conducted an online survey of 845 physicians treating the initial three and seven additional rare conditions to further test our hypotheses and refine our model.

Olson Research Group and Currant Insights are planning to expand this research by covering additional rare diseases and conducting surveys of payers and patients/caregivers.

1 Very low prevalence is a double-edged sword.

Low patient prevalence and few therapeutic options lowers payer scrutiny and results in fewer access restrictions. However, low patient prevalence also results in clinical trial difficulties which suppresses comparative effectiveness research (CER). The lack of CER then fails to keep access restrictions at bay in a crowded market.



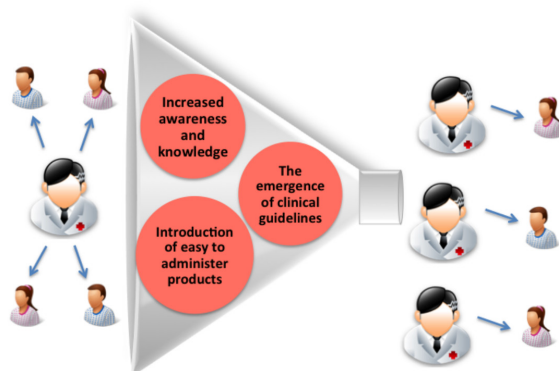
2 Ease of administration leads to efficacy trade-offs.

Many patients are willing to sacrifice some efficacy to realize greater administration convenience. While physicians would prefer to maximize efficacy, most understand and are willing to support this patient preference.



3 The diffusion of care sites is an unintended consequence.

Three drivers are pushing an increasing amount of care away from KOLs to providers who treat only a handful of patients.



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