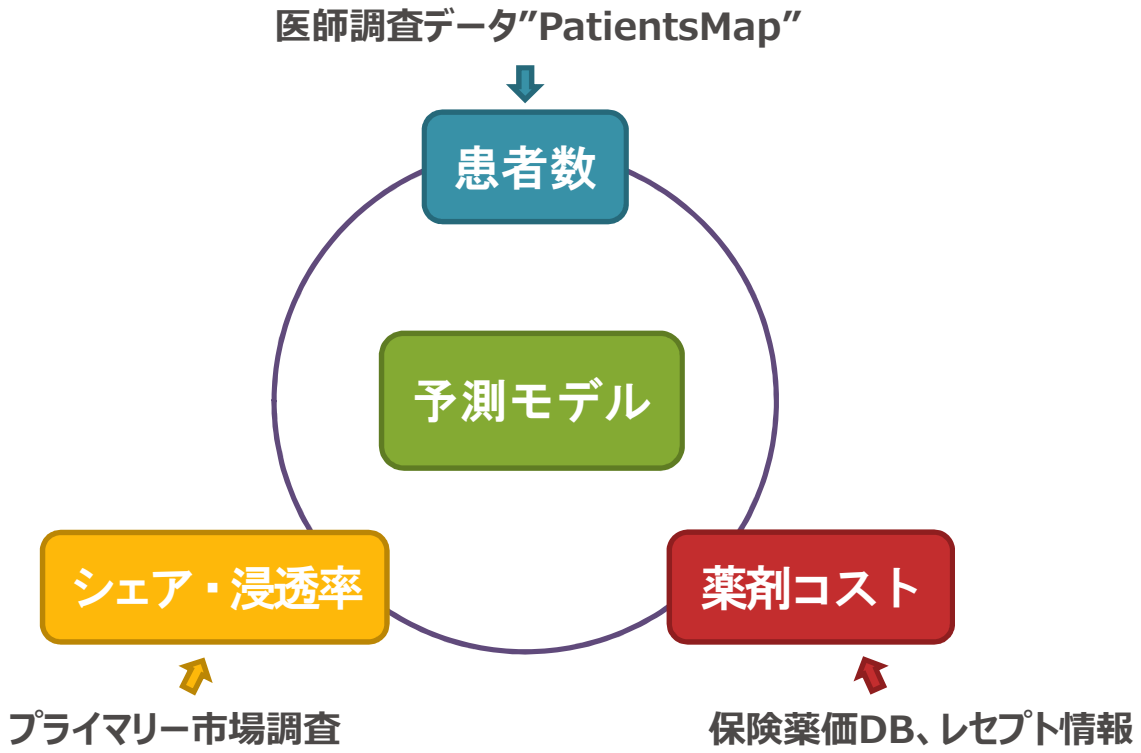
SSRIのフォーキャスティングサポート

予測に必要なデータも含めてご提供が可能 (データ購入/市場調査は任意)



精度の高い売上予測は良質なデータを組み合わせることで得られます
SSRIは目的に適したデータを選択し相互検証して使用します

- 医師調査データ”PatientsMap”
- 保健薬局データ（レセプト情報）
- NDBオープンデータ
- 厚生労働省患者調査
- 企業決算資料
- 保険薬価データベース
- その他（クライアント様がお持ちのデータ）

フォーキャストモデル作成の受託

プライマリー市場調査をおこなわずに短期間でフォーキャストを構築

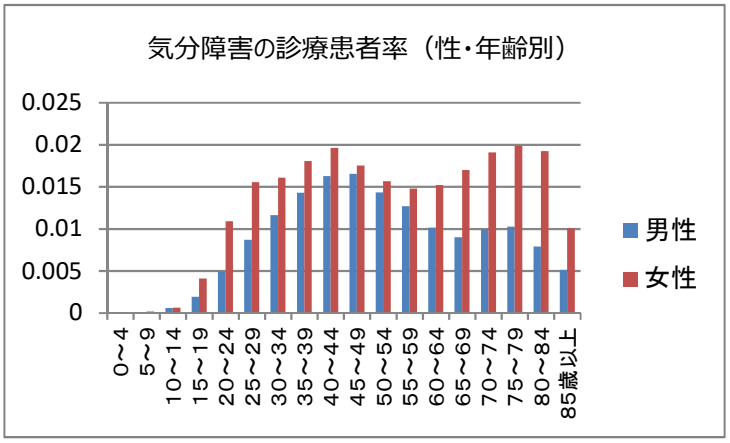
フォーキャストの目的と対象疾患の種類に応じて最適な方法を選択しご提案します

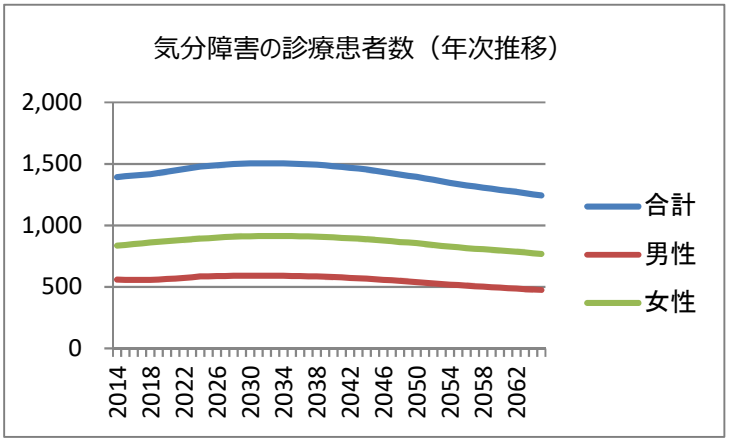
患者数データをベースにしたフォーキャスト

まだ標準的な治療薬が存在せず市場が未成熟な疾患のフォーキャストに最適

大規模調査に基づいた患者数データを相互検証して使用（PatientsMap、厚労省患者調査など）

将来推計人口を反映させて将来の患者数を予測





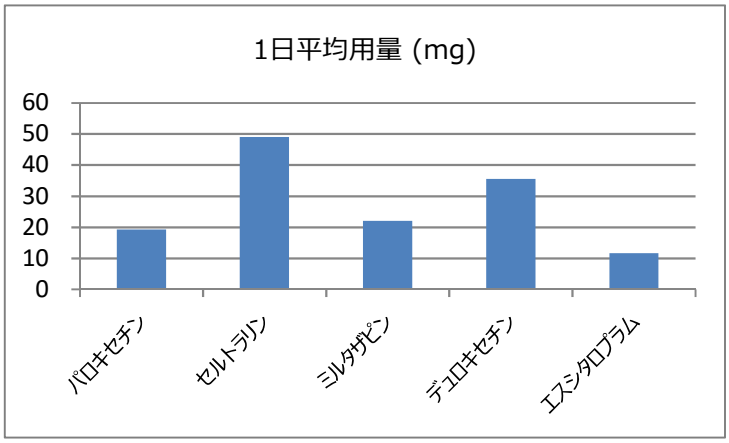
厚労省患者調査データからSSRIが作成

レセプトデータをベースにしたフォーキャスト

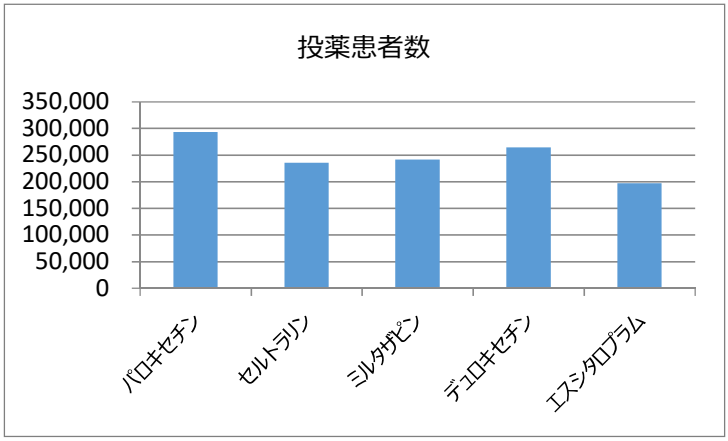
既に治療薬が発売され市場が存在している疾患のフォーキャストに最適

当社の提携会社が保有する調剤レセプトデータとNDBオープンデータを組み合わせてフォーキャストを作成します

クライアント企業で購入されているレセプトデータをご提供いただける場合は、そのデータを使用して予測をおこなうことも可能です（弊社アナリストは市販レセプトデータの豊富な使用経験を有しています）



提携会社データからSSRIが作成

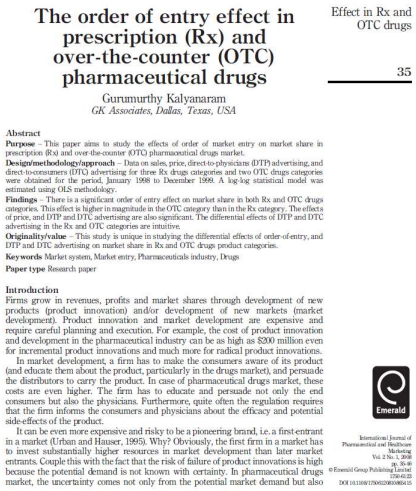


NDBデータからSSRIが作成

ピークシェア予測

市場参入順位に対応したシェアモデル値を予測に使用（海外の文献値を日本市場向けに改変して使用）

競合品との差別化を狙った開発（Best in Class戦略）の場合は、プライマリー市場調査を実施されることを推奨します



The order of entry effect in prescription (Rx) and over-the-counter (OTC) pharmaceutical drugs

Gurumurthy Kalyanaram
GK Associates, Dallas, Texas, USA

Effect in Rx and OTC drugs

35

Abstract

Purpose – This paper aims to study the effects of order of market entry on market share in prescription (Rx) and over-the-counter (OTC) pharmaceutical drugs market.

Design/methodology/approach – Data on sales, price, direct-to-physicians (DTP) advertising, and direct-to-consumers (DTC) advertising for three Rx drugs categories and two OTC drugs categories were obtained for the period, January 1998 to December 1999. A log-log statistical model was estimated using OLS methodology.

Findings – There is a significant order of entry effect on market share in both Rx and OTC drugs categories. This effect is higher in magnitude in the OTC category than in the Rx category. The effects of price, and DTP and DTC advertising are also significant. The differential effects of DTP and DTC advertising in the Rx and OTC categories are intuitive.

Originality/value – This study is unique in studying the differential effects of order-of-entry, and DTP and DTC advertising on market share in Rx and OTC drugs product categories.

Keywords Market system, Market entry, Pharmaceuticals industry, Drugs

Paper type Research paper

Introduction

Firms grow in revenues, profits and market shares through development of new products (product innovation) and/or development of new markets (market development). Product innovation and market development are expensive and require careful planning and execution. For example, the cost of product innovation and development in the pharmaceutical industry can be as high as $200 million even for incremental product innovations and much more for radical product innovations.

In market development, a firm has to make the consumers aware of its product (and educate them about the product, particularly in the drugs market), and persuade the distributors to carry the product. In case of pharmaceutical drugs market, these costs are even higher. The firm has to educate and persuade not only the end consumers but also the physicians. Furthermore, quite often the regulation requires that the firm informs the consumers and physicians about the efficacy and potential side-effects of the product.

It can be even more expensive and risky to be a pioneering brand, i.e. a first-entrant in a market (Urban and Hauser, 1993). Why? Obviously, the first firm in a market has to invest substantially higher resources in market development than later market entrants. Couple this with the fact that the risk of failure of product innovations is high because the potential demand is not known with certainty. In pharmaceutical drugs market, the uncertainty comes not only from the potential market demand but also

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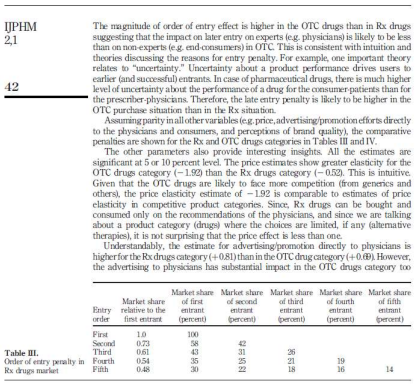


The magnitude of order of entry effect is higher in the OTC drugs than in Rx drugs suggesting that the impact on later entry on experts (e.g. physicians) is likely to be less than on non-experts (e.g. end-consumers) in OTC. This is consistent with intuition and theories discussing the reasons for entry penalty. For example, one important theory relates to "uncertainty." Uncertainty about a product performance drives users to earlier (and successful) entrants. In case of pharmaceutical drugs, there is much higher level of uncertainty about the performance of a drug for the consumer-patients than for the prescriber-physicians. Therefore, the late entry penalty is likely to be higher in the OTC purchase situation than in the Rx situation.

Assuming parity in all other variables (e.g. price, advertising/promotion efforts directly to the physicians and consumers, and perceptions of brand quality), the comparative penalties are shown for the Rx and OTC drugs categories in Tables III and IV.

The other parameters also provide interesting insights. All the estimates are significant at 5 or 10 percent level. The price estimates show greater elasticity for the OTC drugs category (−1.92) than the Rx drugs category (−0.52). This is intuitive. Given that the OTC drugs are likely to face more competition (from generics and others), the price elasticity estimate of −1.92 is comparable to estimates of price elasticity in competitive product categories. Since, Rx drugs can be bought and consumed only on the recommendations of the physicians, and since we are talking about a product category (drugs) where the choices are limited, if any (alternative therapies), it is not surprising that the price effect is less than one.

Understandably, the estimate for advertising/promotion directly to physicians is higher for the Rx drugs category (+0.81) than in the OTC drug category (+0.09). However, the advertising to physicians has substantial impact in the OTC drugs category too

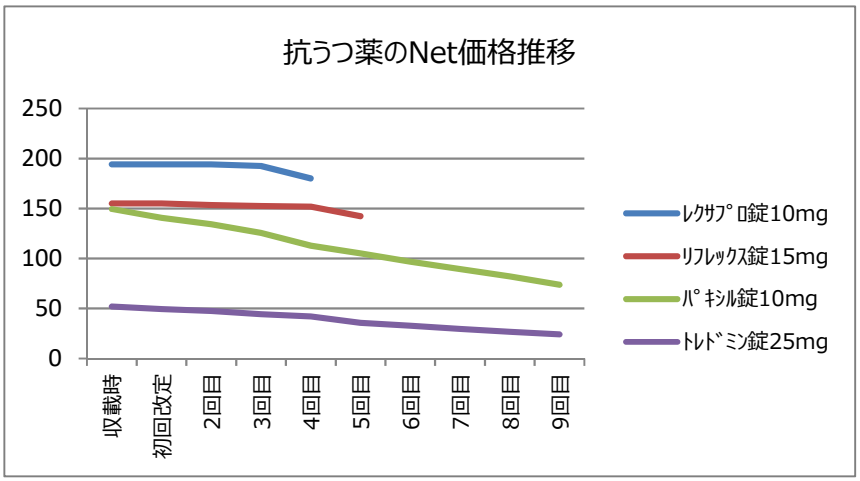
Table III.
Order of entry penalty in Rx drugs market

Entry order	Market share relative to the first entrant	Market share of first entrant (percent)	Market share of second entrant (percent)	Market share of third entrant (percent)	Market share of fourth entrant (percent)	Market share of fifth entrant (percent)
First	1.0	100				
Second	0.73	58	42			
Third	0.61	43	31	26		
Fourth	0.54	35	25	21	19	
Fifth	0.48	30	22	18	16	14

薬価推移予測

過去データを参考にして薬価推移モデルを作成し使用

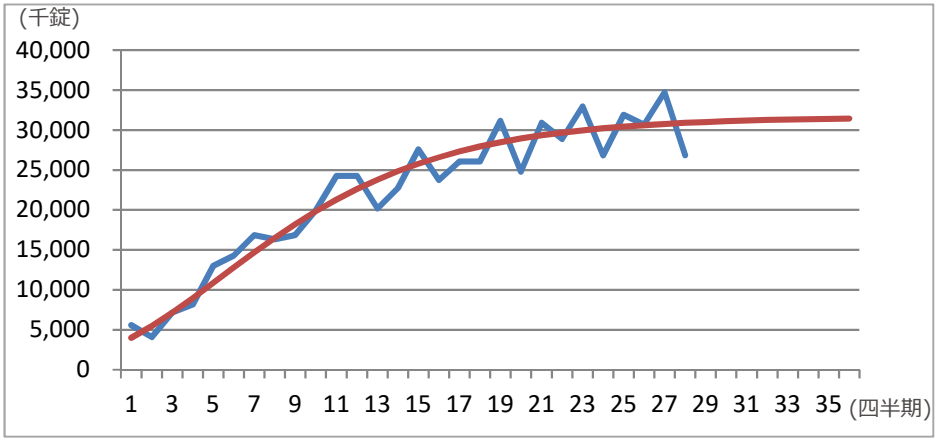
収載時の薬価算定や発売後の薬価改定における不確実性が大きいので、基本的に複数のケースを想定します



消費税と流通マージンを含まない推定Net価格（保険薬価データベースを使用して作成）

数量推移予測

過去データを参考にしてS字カーブモデルを作成し使用



製品売上数量（企業決算資料と保険薬価データベースを使用して作成）

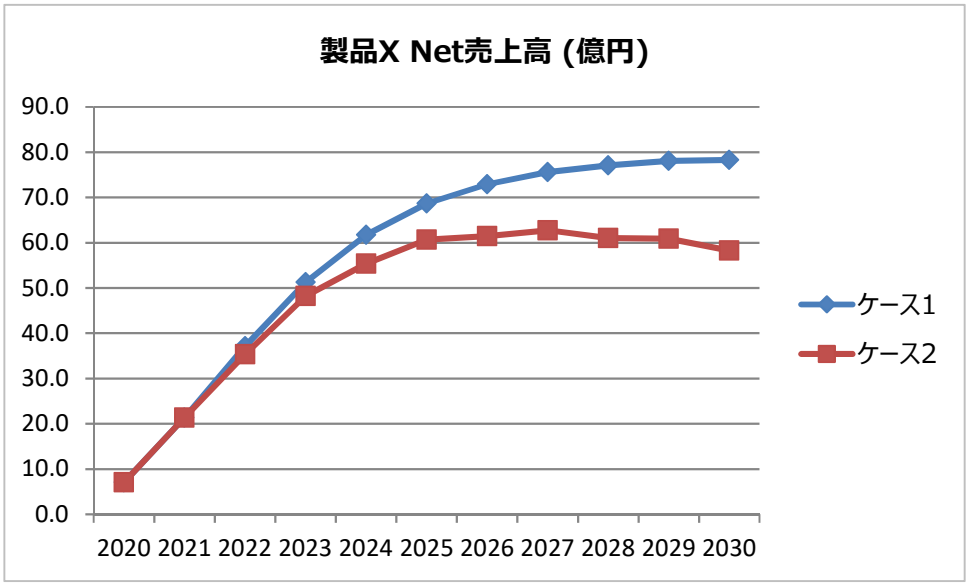
アウトプットの例

報告書とシンプルなエクセルファイルを納品

シェア推移／薬価推移が異なる複数のケースを同時に表示できます

売上予測（年次、1-12月）
製品名：製品X
疾患名：うつ病

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
診療患者数 (千人)													
治療抵抗性うつ	194	195	197	198	200	201	202	203	204	205	205	206	206
薬剤処方患者数 (千人)													
治療抵抗性うつ	183	184	185	186	188	189	190	191	192	193	193	194	194
製品X 処方患者数 (千人)													
ケース1			16	35	61	85	103	114	122	127	129	131	132
ケース2			16	35	61	85	103	114	122	127	129	131	132
製品X Net売上高 (億円)													
ケース1	0.0	0.0	7.1	21.4	37.1	51.3	61.7	68.7	72.9	75.6	77.1	78.1	78.3
ケース2	0.0	0.0	7.1	21.4	35.4	48.2	55.3	60.7	61.5	62.8	61.1	60.9	58.3



ご活用例

製薬企業のR&D戦略立案、マーケティング戦略立案、ライセンス導入検討用など