5. CONCLUSION AND RECOMMENDATIONS

5.1. Conclusion

Specialists managed a larger number of BPH patients compared to GPs (82 vs 10 per month). Nearly a third of BPH patients seen by both GPs and Specialists were newly diagnosed. This indicates that the BPH market is promising for a new market entrant. GPs referred an average of 38% of their patients to Specialists whereas the vast majority of Specialists did not refer out their patients.

More than half of the BPH patients were prescribed drug therapy by both GPs (61%) and Specialists (52%), either in monotherapy or in combination with surgical/invasive treatment. A large proportion of patients seen by GPs (75%) and Specialists (85%) returned for follow-up drug therapy.

Physician's choice of drugs was based on efficacy, safety profile, price, patient tolerability and severity of symptoms. Specialists were more concerned with the safety profile of a product. In general, cost reduction and improved efficacy were more important reasons for increase in future usage of any product.

Product X was the most common product prescribed by both GPs (45% of patients treated) and Specialists (51% of patients treated). Product Y was more commonly used by Specialists (30% of patients treated) compared to GPs (24% patients treated). In contrast, Product Z was more frequently used by GPs (31% treated) than Specialists (19% treated).

The use of Product Y was expected to continue to increase amongst Specialists as 20% expected to increase their use of this product in the future. However, the future competition from product Z would be in the GP market, as 23% GPs anticipated an increase in the use of Product Z, while 23% GPs also claimed that they do not expect to use Product Y at all in the future.

The predicted penetration price of the proposed product "U" with once daily dose was RM 1.10 for GPs and RM 1.40 for Specialists, while the highest reasonable price that was acceptable to all customers was RM1.55.

5.2. Recommendation

The Specialists treat more BPH patients than GPs and at present more commonly prescribe Product Y. The Specialists therefore should be the main group of doctors who should be targeted by Company A.

Compared to GPs, the Specialists were more concerned over safety profile of the products. Hence, programs to keep physicians up to date and create greater awareness amongst all physicians should focus on the better efficacy as well as its better safety profile of Product Y.

With the relative advantage in terms of 'quality' characteristics (less side effects, better efficacy) and the benefit of the once daily formulation, Product U may be priced at a higher than the customer expected penetration price.