

Market Access Impact - Asthma/COPD (EU5)

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Abstracts

How are market barriers impacting market share for the leading asthma/COPD brands?

Three brands top the list in Europe as most prescribed treatments for asthma and COPD, but are these the preferred options or are market barriers pushing physicians toward them? Delve behind the headline numbers and find out the constraints impacting decision-making – to the benefit of some brands and the detriment of others.

This new report from FirstView, Market Access Impact: Asthma/COPD, assesses current barriers and their effects for 12 leading asthma/COPD drugs from GSK, Novartis, AstraZeneca, Boehringer Ingelheim and Roche.

Use this powerful insight into physician thinking to optimise your market access strategy and increase market penetration.

KEY QUESTIONS ANSWERED

Seretide (fluticasone/salmeterol; GSK): How much share does Seretide stand to gain if current barriers are overcome?

Anoro (umeclidinium/vilanterol; GSK): Which is the biggest factor prompting lost share for Anoro?

Onbrez (indacaterol; Novartis): Which 3 brands should the focus be on to get a net market share gain?

Relvar Ellipta (vilanterol/fluticasone furoate; GSK): If barriers to other brands were alleviated, would market share be gained or lost?

Daxas (roflumilast; AstraZeneca): Which brand is Daxas losing out to the most?

Nucala (mepolizumab; GSK): 19% of physicians cite at least 3 barriers influencing Nucala prescribing – formulary availability tops the list, but what are the others?

Seebri (glycopyrronium; Novartis): What are the top-3 barriers to prescribing Seebri? Which other brand is benefiting the most?

Spiriva (tiotropium; Boehringer Ingelheim): Spiriva is gaining share from multiple brands surveyed, but losing out to one. Which competitor should now be in the spotlight?

Symbicort (budesonide/formoterol; AstraZeneca): Which brand is stealing the most share from Symbicort?

Eklira (aclidinium; AstraZeneca): Eklira is struggling to gain traction in this highly competitive market. Which competitors should the focus be on to tip the balance?

Ultibro (indacaterol/glycopyrronium; Novartis): Two competitors are taking share; which ones and why?

Xolair (omalizumab; Novartis/Roche): two thirds of physicians cite one or multiple barriers to prescribing Xolair. Which other brands are benefiting?

TOP TAKEAWAYS

Barriers are affecting market share: A notable proportion of all prescribing decisions are impacted by perceived barriers.

Clear winners and losers: Half the brands covered see a net gain in market share, whilst the other half are showing losses.

One brand dominates... for now: Although there is a clear market leader, the vast majority of physicians are also actively considering or using some competitor brands.

One brand is losing out across the board: If barriers were successfully overcome, how much share could potentially be achieved for this brand?

'Other' brands benefiting the most: The remaining brands not included in this survey together achieve by far the largest net share gain thanks to prescribing barriers.

Europe and the US differ: Differences are seen in terms of the most prescribed brands and the effect barriers are having on prescribing behaviour.

Exploring Market Access Issues

Market Access Impact: Asthma/COPD explores key issues affecting drug manufacturers. You'll learn:

How barriers affect market access:

Which brands are physicians prescribing for asthma/COPD?

How are barriers affecting prescribing decisions?

Which brands gain and lose the most market share?

How barriers affect your brand:

How many doctors prescribe your brand? How many don't, but would consider it?

Why don't doctors prescribe your brand? What do they prescribe instead?

Which competing brands does your brand take market share from?

A Report Based on Expert Knowledge

We surveyed 150 pulmonologists in the EU5 (France, Germany, UK, Italy and Spain).

All respondents have:

Been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with melanoma in total in the last month

We conducted the survey between the 8th and 13th June 2016.

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