

Market Access Impact - Asthma/COPD (US)

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Abstracts

Are market barriers helping or hindering your asthma/COPD brand's performance?

Three brands top the list in the US as the 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

Advair (fluticasone/salmeterol; GSK): If barriers to other brands were alleviated, how much market share would Advair lose?

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

Arcapta (indacaterol; Novartis): Which 3 brands should Arcapta focus on to win back market share?

Breo Ellipta (vilanterol/fluticasone furoate; GSK): How much share does Breo Ellipta stand to gain if current barriers are overcome?

Daliresp (roflumilast; AstraZeneca): Which 2 brands is Daliresp losing out to the most?

Nucala (mepolizumab; GSK): 15% of physicians cite at least 3 barriers influencing Nucala prescribing - lack of reimbursement 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): Which of the brands surveyed is Spiriva gaining share from? Which competitors should be in the spotlight?

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

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

Utibron (indacaterol/glycopyrronium; Novartis): Is awareness an issue? What proportion of physicians surveyed say they are unaware of Utibron within the asthma/COPD landscape?

Xolair (omalizumab; Novartis/Roche): 81% of physicians cite one or multiple barriers to prescribing Xolair; which other brands are benefiting?

TOP TAKEAWAYS

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

More losers than winners: Three brands see a net gain in market share, whilst the remaining nine are showing losses.

The 'top-spot' is closely contested: Two brands are fighting a close battle on market share gains, but can they hold onto their leading position as market newcomers gain traction?

'Market-access' barriers have a significant effect: Reimbursement issues and lack of formulary availability together affect more prescriptions than any other barrier.

Newcomers are a threat to the status quo: If barriers were successfully overcome, two drugs could leap ahead.

'Other' brands benefiting: The remaining brands not included in this survey together achieve the third biggest net share gain thanks to prescribing barriers.

US and Europe differ: In terms of both the brands most prescribed and the effect barriers have on prescribing

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 100 pulmonologists in the US, chosen from the largest community of validated physicians in the world. All respondents have:

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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