

# Market Access Impact (EU5) [Asthma/COPD]

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## Abstracts

In the EU5 countries, market barriers affect a modest 15% of asthma/COPD prescriptions, but they're siphoning market share from most of the brands we surveyed. That lost share goes to a handful of brands, putting the market leaders even further ahead. Meanwhile some brands have a bigger problem: doctors aren't prescribing them because they don't know they exist.

Market Access Impact: Asthma/COPD (EU5) shows you how widely prescribed your brand is, and reveals how 7 barriers affect your market share. You'll learn how much share you win and lose, who you take share from, and who gets your lost share.

Market barriers cost most brands share, but awareness is a bigger issue for some

Based on a survey of 150 pulmonologists, the report covers 11 major therapies from AstraZeneca, Boehringer Ingelheim, GSK, and Novartis.

### Top Takeaways

Barriers affect nearly 15% of prescriptions: Most barriers have a more or less equal overall impact, but each one affects some brands more than others.

Most brands lose share: 7 of the 11 surveyed brands lose market share because of barriers, although those losses tend to be modest.

2 brands have a big lead: They're prescribed by at least 10% more doctors than their closest competitor, and enjoy a sizeable market share advantage.

2 barriers are holding one brand back: 30-40% of surveyed doctors can't prescribe it due to high cost or patient type recommendations.

Not all doctors see the problem: At least half of the surveyed doctors don't experience any barriers with most of the surveyed brands.

Need for improvement: Up to almost 40% of doctors either wouldn't prescribe many of the surveyed brands, or haven't heard of them at all.

## Insight into 11 Asthma/COPD Disease Drug

Anoro (umeclidinium/vilanterol; GSK)

Daxas (roflumilast; AstraZeneca)

Eklira (aclidinium; AstraZeneca)

Onbrez (indacaterol; Novartis)

Relvar Ellipta (vilanterol/fluticasone furoate; GSK)

Seebri (glycopyrronium; Novartis)

Seretide (fluticasone/salmeterol; GSK)

Spiriva (tiotropium; Boehringer Ingelheim)

Symbicort (budesonide/formoterol; AstraZeneca)

Ultibro (indacaterol/glycopyrronium; Novartis)

Xolair (omalizumab; Novartis)

## Exploring Important Market Access Issues

Market Access Impact: Asthma/COPD (EU5) explores key issues affecting drug manufacturers. You'll learn:

How barriers affect market access:

What brands do doctors prescribe the most?

How many prescriptions do barriers affect?

Which barriers have the biggest impact?

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—30 from each EU5 country (France, Italy, Germany, Spain, UK)—chosen from the largest community of validated physicians in the world.

All respondents have:

Been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with Parkinson's disease in the last month

We conducted the survey between June 1st and 5th, 2017.

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## Contents

**1.WHAT ARE MARKET BARRIERS?**

**2.ABOUT THIS REPORT**

**3.ABOUT THE SURVEY**

**4.BRANDS INCLUDED IN THE SURVEY**

**5.EXECUTIVE SUMMARY**

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