

# Market Access Impact (EU5) [CLL]

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## Abstracts

How are market barriers moving the goalposts for CLL drugs in Europe?

Just how significantly are market barriers skewing prescribing behaviour for CLL drugs in Europe? One drug is clearly popular and others are playing 'catch-up' on the market share stakes – but what difference would it make if the landscape shifted and non-clinical constraints such as cost, availability, administrative restrictions, institutional guidelines, and patient preferences were removed or changed?

Market Access Impact: CLL (EU5) examines the dynamics of the CLL drug market in Europe. It specifically looks at how various market access barriers are impacting the 5 most popular CLL drugs from Gilead, Janssen, Roche and Novartis/Genmab.

### Top Takeaways

Total recall: One anti-CD20 brand has proved popular with oncologists, and 100% of those surveyed said they either use or would consider it. How well do other brands do in the awareness stakes?

Spoilt for choice: Physicians have a choice of effective CLL treatment options, but 1 in 5 prescribing decisions are affected by market barriers. Find out which ones apply to which drugs.

Look for the positives: Barriers cause two thirds of oncologists to prescribe other than their first choice – and two brands are benefitting. Why are market barriers an advantage for some?

Not what it seems: One brand gains almost 4% share due to market barriers which looks great at first glance – but there's bigger loss overall. Find out the

detail behind the top line.

Different stories: All 5 drugs in the survey show different impact patterns due to market barriers. What should be the priority for individual market access teams?

## Insight into 5 Leading CLL Drugs

Arzerra (ofatumumab; Novartis/Genmab)

Gazyvaro (obinutuzumab; Roche)

Imbruvica (ibrutinib; Janssen)

MabThera (rituximab; Roche)

Zydelig (idelalisib; Gilead)

## Lifting the lid on Market Access issues

Market Access Impact: CLL provides an up-to-date assessment of the issues affecting current prescribing patterns for CLL drugs. You'll learn:

### How barriers affect market access

Which CLL brands are physicians prescribing the most?

How are prescribing decisions being affected by market barriers?

Are some barriers having more impact than others?

### 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 choose instead?

Which competing brands does your brand take market share from?

A Report Based on Expert Knowledge

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

All respondents have

Been practising for 2+ years

Prescribed at least one of the listed products

Seen at least 5 chronic lymphocytic leukaemia patients in total in the last month

We conducted the survey between 2nd and 8th May 2017.

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views and intelligence on the challenges facing pharma today.

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