

## Market Access Impact (EU5) [MS]

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### Abstracts

Market barriers affect nearly 15% of multiple sclerosis prescriptions in the EU5

In the EU5 countries, market barriers affect a modest 15% of multiple sclerosis prescriptions, but they're giving market share to most of the brands we surveyed. These market share gains go to 7 of the 11 brands we surveyed, putting the market leaders even further ahead. Meanwhile some brands have a bigger problem: doctors aren't prescribing them at the same rates as other treatments.

Market Access Impact: Multiple Sclerosis (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.

Based on a survey of 150 neurologists from the key EU5 markets (France, Germany, Italy, Spain and the UK), the report covers 11 major therapies from Genzyme, Biogen, Sanofi, Bayer, Teva, Novartis, Merck Group, and AbbVie/Biogen.

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#### 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 gain share. 7 of the 11 surveyed brands lose market gain share because of barriers, and these gains are significant for the leading brands.

One brand has a big lead. Despite the fact that this brand is only the sixth most prescribed brand, barriers are proving to be a huge positive as it gains the most

share than any other brand.

2 barriers are holding most brands back. All surveyed neurologists opine that they can't prescribe many of the brands due to patient related issues.

Awareness is good for all brands. Very few neurologists haven't heard of the brands we surveyed, but 'willingness to try' data might be surprising for some brands.

### Insight into 11 Major Asthma/COPD Drugs

Aubagio (teriflunomide; Sanofi)

Avonex (interferon beta-1a; Biogen)

Betaferon (interferon-beta-1; Bayer)

Copaxone (glatiramer acetate; Teva)

Gilenya (fingolimod; Novartis)

Lemtrada (alemtuzumab; Genzyme)

Plegridy (peginterferon beta-1a; Biogen)

Rebif (interferon beta-1a; Merck Group)

Tecfidera (dimethyl fumarate; Biogen)

Tysabri (natalizumab; Biogen)

Zinbryta (daclizumab; AbbVie/Biogen)

### Exploring Market Access Barriers

Market Access Impact: Multiple Sclerosis (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 neurologists—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 asthma and/or COPD in total in the last month

We conducted the survey between July 3rd and 13th, 2017.

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