

## Market Access Impact (EU5) [NSCLC]

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### Abstracts

Eliminating prescription barriers could break the tie at the top of the market

The two leading brands in the EU5 non-small cell lung cancer (NSCLC) market are tied for market share, but one of them benefits more from market barriers that prevent oncologists from prescribing competing treatments. Eliminating those barriers could help the other leading brand take a narrow, but significant lead.

Get the details in Market Access Impact: NSCLC (EU5).

You'll see how widely prescribed your brand is, and learn how 7 barriers affect your market share. You'll also find out how much share you win and lose, who you take share from, and who gets your lost share.

Based on a survey of 150 medical oncologists from the EU5 countries (France, Germany, Italy Spain, UK), the report covers 10 major therapies from AstraZeneca, Boehringer Ingelheim, Bristol-Myers Squibb, Eli Lilly, Merck Sharpe & Dohme, Novartis, Pfizer/Merck Group, and Roche.

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### Top Takeaways

Market access is a key concern: While barriers affect over 15% of prescriptions overall, market access barriers are responsible for nearly a third of that impact.

More brands lose out: Barriers cause more brands to lose market share than to

gain, and the losses tend to be bigger than gains.

Tie-breaker: The two leading brands have equal market share, but eliminating barriers would cause one of them to lose enough share to give the other a narrow lead.

Problem areas: Some barriers have an outsized effect on some brands, e.g., reimbursement and formulary availability are the issues for the brand in the last-place.

Barrier effect is widespread: 45–65% of doctors experience at least one or more barriers with every surveyed brand.

Overall perception is good: Most doctors either prescribe, or would consider prescribing all of the surveyed brands, and no more than 5% of doctors are unaware of any given brand.

### Insight into 10 Major NSCLC Drugs

Avastin (bevacizumab; Roche)

Cyramza (ramucirumab; Eli Lilly)

Giotrif (afatinib; Boehringer Ingelheim)

Iressa (gefitinib; AstraZeneca)

Keytruda (pembrolizumab; Merck Sharpe & Dohme)

Opdivo (nivolumab; Bristol-Myers Squibb)

Tagrisso (osimertinib; AstraZeneca)

Tarceva (erlotinib; Roche)

Xalkori (crizotinib; Pfizer/Merck Group)

Zykadia (ceritinib; Novartis)

## Exploring Market Access Barriers

Market Access Impact: NSCLC (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 medical oncologists—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 NSCLC in total in the last month

We conducted the survey between August 1st and 16th, 2017.

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