

# Market Access Impact (EU5) [PsO]

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## Abstracts

Eliminating market barriers could lift the last place brand into the middle of the pack

In the EU5 countries, market barriers affect nearly a quarter of psoriasis prescriptions. Most of the brands we surveyed gain or lose a little bit of market share, but one brand is having a much harder time of it. If it can find a way to overcome market barriers, this brand could climb from dead last to somewhere in the middle of the pack.

Find out whether breaking down market barriers can give your brand a boost in Market Access Impact: Psoriasis (EU5).

Based on a survey of 150 dermatologists, the report covers 10 major therapies from AbbVie, Biogen, Celgene, Eli Lilly, Janssen Cilag, Merck Sharp & Dohme, Napp/Mundipharma, Novartis, and Pfizer. Handy graphs and charts reveal which of 7 different barriers cost your brand the most market share, and which ones help you take the most from competitors.

### Top Takeaways

Barriers have a modest effect on surveyed brands: They affect nearly a quarter of prescriptions, but no surveyed brand gains or loses more than 2 percent of its share because of them.

“Other” brands see significant benefits: In aggregate, brands not surveyed see the largest barrier-related gain, putting them ahead of more than a third of surveyed brands.

Barriers are holding the last-place brand down: If barriers didn't exist, the last-place brand would climb to the middle of the pack.

The barrier effect is uneven: Several barriers have a big effect on a small number of brands, and less of an effect on the rest.

Many doctors don't experience barriers at all: 40 percent or more of surveyed doctors don't experience any barriers with most of the surveyed brands.

Several brands have perception problems: 14 to 24 percent of surveyed doctors either wouldn't consider prescribing them or simply don't know they exist.

### Insight into 10 Major Psoriasis Drugs

Benepali (etanercept; Biogen)

Cosentyx (secukinumab; Novartis)

Enbrel (etanercept; Pfizer)

Humira (adalimumab; AbbVie)

Inflectra (infliximab; Pfizer)

Otezla (apremilast; Celgene)

Remicade (infliximab; Merck Sharp & Dohme)

Remsima (infliximab; Napp/Mundipharma)

Stelara (ustekinumab; Janssen Cilag)

Taltz (ixekizumab; Eli Lilly)

### Exploring Important Market Access Issues

Market Access Impact: Psoriasis (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 dermatologists—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 psoriasis in total in the last month

We conducted the survey between February 1st and 7th, 2017.

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