

Market Access Impact (EU5) [RCC]

<https://marketpublishers.com/r/MA28EE1E11FEN.html>

Date: April 2017

Pages: 0

Price: US\$ 5,145.00 (Single User License)

ID: MA28EE1E11FEN

Abstracts

Eliminating market barriers could help one brand almost double its market share

Market barriers have a modest but significant effect on renal cell carcinoma (RCC) prescriptions in the EU5. The brands that can find a way to eliminate them stand to make important share gains. Especially in the middle of the market, where competition is lively, and at the bottom of the market, where one brand is poised to nearly double its market share.

Find out which barriers are costing your brand market share Market Access Impact: RCC (EU5).

Based on a survey of 150 medical oncologists, the report covers 9 major therapies from Bayer, Bristol-Myers Squibb, Exelixis, Ipsen Novartis, Pfizer, and Roche. Handy graphs and charts show you how 7 barriers affect your market share, revealing which competitors you gain share from, and lose it to.

Top Takeaways

The top three barriers affect the market equally: Together they're responsible for half of the overall impact on prescriptions.

Eliminating barriers would shake up the middle of the market: The fourth and fifth place brands would each drop by two spots to sixth place and seventh place respectively.

Barriers are keeping one brand stuck in last place: Significantly more doctors experience barriers with this brand. If barriers didn't exist, its market share would double.

Many doctors may not see the problem: 55 percent or more of them don't experience any barriers with most of the surveyed brands.

Doctors are open to alternatives: 80% or more of surveyed doctors either prescribe, or would consider prescribing all of the surveyed brands.

One brand has a big perception problem: Every doctor has heard of it, but nearly 20% say they wouldn't prescribe it.

Insight into 9 Major RCC Drugs

Afinitor (everolimus; Novartis)

Avastin (bevacizumab; Roche)

Cabometyx (cabozantinib; Exelixis/Ipsen)

Inlyta (axitinib; Pfizer)

Nexavar (sorafenib; Bayer)

Opdivo (nivolumab; Bristol-Myers Squibb)

Sutent (sunitinib; Pfizer)

Torisel (temsirolimus; Pfizer)

Votrient (pazopanib; Novartis)

Exploring Market Access Barriers

Market Access Impact: RCC (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.

Been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with RCC in total in the last month

We conducted the survey between April 3rd and 7th, 2017.

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