

# Market Access Impact: HIV (US) 2018

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## Abstracts

Market barriers affect just over 1 in 10 HIV prescriptions. Is your brand losing out?

In the US, where market barriers affect just over one in 10 HIV prescriptions, the top brand has a significant lead over all other brands. Find out what's driving its share gains, and what your brand can do to level the playing field in Market Access Impact: HIV (US) [2018].

Based on a survey of 100 infectious disease specialists, the report covers 12 major therapies from Gilead, ViiV, Merck & Co., BMS and Janssen Biotech. Handy graphs and charts reveal which of the 7 different barriers cost your brand the most market share, and which ones help you take the most from competitors.

### Top Takeaways

Barriers affect just over one in 10 prescriptions: But is it cost, formulary issues or some other barrier combinations that cause the most amount of pain?

Only one brand sees a significant share increase: Four brands gain share thanks to barriers, but the top-gaining brand sees a much bigger bump than the other three.

One brand sees a significant loss: This brand loses 2.5% of its market share because of barriers. Why? And can this be prevented?

Eliminating barriers would have limited impact at the top and bottom of the table: The leading brand relies on other brands losing out, but removing barriers wouldn't have a massive impact on market share for other brands. What does this mean to the overall makeup of the market?

Two brands have a perception problem: Between a quarter and a third of surveyed doctors would not prescribe these brands, leaving other brands to capture market share.

## Insight into 12 Major HIV Drugs

Atripla (efavirenz/emtricitabine/tenofovir disoproxil fumarate; Gilead)

Descovy (emtricitabine/tenofovir alafenamide; Gilead)

Genvoya (cobicistat/elvitegravir/emtricitabine/tenofovir alafenamide; Gilead)

Odefsey (emtricitabine/rilpivirine/tenofovir alafenamide; Gilead)

Triumeq (abacavir/dolutegravir/lamivudine; ViiV Healthcare)

Tivicay (dolutegravir; ViiV Healthcare)

Isentress (raltegravir; Merck & Co.)

Prezcobix (darunavir/cobicistat; Janssen Biotech)

Eduvant (rilpivirine; Janssen Biotech)

Prezista (darunavir; Janssen Biotech)

Reyataz (atazanavir; Bristol-Myers Squibb)

Juluca (dolutegravir/rilpivirine, ViiV Healthcare)

## Exploring Market Access Barriers

Market Access Impact: HIV (US) explores key issues affecting HIV 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 100 US-based infectious disease specialists, chosen from the largest community of validated physicians in the world. All respondents have:

All respondents:

Have been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients in total in the last month

We conducted the survey between March 5-12, 2018.

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