

## Market Access Impact: Melanoma (EU5) 2018

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### Abstracts

Market barriers affect a fifth of melanoma prescriptions. Is your brand losing out?

In the EU5, market barriers affect a fifth of all melanoma prescriptions, giving the top brand a narrow lead over two rivals that are in

2nd and 3rd place. Find out how eliminating barriers would shake up the top and middle of the market, and help the last place brand double its

share in Market Access Impact: Melanoma (EU5) [2018].

Based on a survey of 150 oncologists and dermato-oncologists, the report covers 8 major therapies from Amgen, Bristol-Myers Squibb,

Merck Sharp & Dohme, Novartis, and Roche. 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.

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#### Top Takeaways

Barriers affect a fifth of all prescriptions: But two barriers in particular affect more prescriptions than the others.

Market access is not the problem: Barriers related to market access affect far fewer prescriptions than either of the top two barriers.

Four brands gain share: But the most prescribed brand sees a significantly larger net gain than any other brand.

One brand loses big: The least-prescribed brand loses far more market share than any competitor, and suffers disproportionately from four of the seven barriers.

Eliminating barriers would shake up the rankings: Moving one brand into second place, shuffling the order in the middle of the pack, and doubling share for the last-place brand.

One brand has a big perception problem: Nearly 15% of surveyed doctors didn't even know it existed.

## Insight into 8 Major Melanoma Drugs

Cotellic (cobimetinib; Roche)

Imlygic (talimogene laherparepvec; Amgen)

Keytruda (pembrolizumab; Merck Sharp & Dohme)

Mekinist (trametinib; Novartis)

Opdivo (nivolumab; Bristol-Myers Squibb)

Tafinlar (dabrafenib; Novartis)

Yervoy (ipilimumab; Bristol-Myers Squibb)

Zelboraf (vemurafenib; Roche)

Market Access Impact: Melanoma (EU5) explores key issues affecting Melanoma 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 and dermato-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:

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 January 10-23, 2018.

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