

Market Access Impact: Non-Small Cell Lung Cancer (EU5) 2016

<https://marketpublishers.com/r/M707B1B125EEN.html>

Date: August 2016

Pages: 0

Price: US\$ 4,995.00 (Single User License)

ID: M707B1B125EEN

Abstracts

Prescription barriers hurt 5 of the 9 brands we surveyed. Is your brand losing market share?

In the EU5, one of the most prescribed NSCLC drugs is stuck in 2nd place due to the biggest barrier-related market share loss of any brand we surveyed. Can addressing key market barriers move this runner-up brand into the lead? Which 3 rival brands managed small barrier-related gains? Which barriers have the biggest impact on market share?

Find out in Market Access Impact: NSCLC. Request sample pages

The report covers 9 major NSCLC drugs from AstraZeneca, BMS, Boehringer Ingelheim, Eli Lilly, Novartis, Pfizer/Merck Group, and Roche. You'll learn which brands take the biggest hit from 7 different market barriers, which barriers cost your brand the most share, and which competitors you're losing share to and taking it from.

Top Takeaways

Market barriers are holding the 2nd place brand back: Would addressing key barriers be enough to move this brand into first place?

Clear winners and losers: 91% of doctors surveyed prescribe the leading brand while only 21% prescribe the last-place brand. Of the seven other brands surveyed, five are widely prescribed.

Most brands are losing share: Only three brands see net market share gains

because of market barriers. The rest see small to significant losses.

Huge gain for “Other” brands: They take share from all but one of the surveyed brands, and in aggregate, their total net share gain is four times as big as that of any surveyed brand

Each barrier affects specific brands disproportionately: Significantly more doctors experience each barrier more with one or two brands than with the rest of the pack.

Market access affects more prescriptions than other barriers: Taken together barriers related to market access affect nearly twice as many prescriptions as any other barrier.

Insight into 9 Major NSCLC Drugs

Avastin (bevacizumab; Roche)

Cyramza (ramucirumab; Eli Lilly)

Giotrif (afatinib; Boehringer Ingelheim)

Iressa (gefitinib; AstraZeneca)

Opdivo (nivolumab; BMS)

Portrazza (necitumumab; Eli Lilly)

Tarceva (erlotinib; Roche)

Xalkori (crizotinib; Pfizer/Merck Group)

Zykadia (ceritinib; Novartis)

Exploring Important Market Access Issues

Market Access Impact: NSCLC explores key issues affecting NSCLC 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? %li%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 5th, 2016.

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