

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

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## Abstracts

7 of the 10 brands we surveyed lose share due to market barriers. Is your brand one of them?

In the US, market barriers are causing 7 of the 10 NSCLC drugs we surveyed to lose market share. What's driving the top 3 brands' small share gains? Which barrier has the biggest impact, and which two brands is it hurting the most? Would eliminating market barriers close the gaps between leading brands and lower-ranked rivals?

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

The report covers 10 major NSCLC drugs from AstraZeneca, BMS, Boehringer Ingelheim, Eli Lilly, Merck & Co., Novartis, Pfizer/EMD Serono, 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.

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### Top Takeaways

Three brands lead the pack: While more than half of the doctors surveyed prescribe eight of the ten brands covered in the report, nearly all doctors prescribe the top three brands.

Most brands are losing share: Only the three most prescribed brands see net market share gains because of market barriers. The rest see small losses.

“Other” brands benefit the most: They take share from all but one of the surveyed brands, and in aggregate, their total net share gain is larger than that of any surveyed brand.

The top barrier affects two brands disproportionately: Significantly more doctors experience this barrier with the most prescribed, and fourth most prescribed brands.

Market access affects more prescriptions than other barriers: Taken together barriers related to market access affect slightly more prescriptions than any other barrier.

One brand has a small perception problem: 15% of the doctors surveyed would not consider prescribing this brand. For the rest of the surveyed brands, that number is below 10%.

## Insight into 10 Major NSCLC Drugs

Avastin (bevacizumab; Roche)

Cyramza (ramucirumab; Eli Lilly)

Gilotrif (afatinib; Boehringer Ingelheim)

Iressa (gefitinib; AstraZeneca)

Keytruda (pembrolizumab; Merck & Co.)

Opdivo (nivolumab; BMS)

Portrazza (necitumumab; Eli Lilly)

Tarceva (erlotinib; Roche)

Xalkori (crizotinib; Pfizer/EMD Serono)

Zykadia (ceritinib; Novartis)

## Exploring Market Access Barriers

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 100 US medical oncologists, 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 NSCLC in total in the last month

We conducted the survey between August 1st and 5th, 2016.

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