

## Market Access Impact (US) [Asthma/COPD]

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### Abstracts

Two brands enjoy big market share boosts as market barriers hinder competitors

Market barriers affect more than a third of asthma/COPD prescriptions in the US. According to our survey, roughly 55% of doctors can't prescribe certain brands because they're either too expensive, or not available of formularies. Not all brands lose out, though. Two of the leading treatments get a market share bump of almost 5% because doctors can't prescribe competitors.

Market Access Impact: Asthma/COPD (US) shows you how 7 barriers affect your market share, revealing how much you win and lose, who you take share from, and who gets your lost share.

Based on a survey of 100 US-based pulmonologists and primary care physicians, the report covers 12 major therapies from AstraZeneca, Boehringer Ingelheim, GSK, Novartis, and Roche.

#### Top Takeaways

Barriers affect more than a third of prescriptions: The two biggest barriers have a bigger impact than all other barriers combined.

Two brands see impressive market share gains: Each sees a net increase of nearly 5% because barriers prevent doctors from prescribing competing treatments.

Most brands lose: 8 of the 12 surveyed brands see a net market share loss, although many of those losses are modest.

Few brands are widely prescribed: Only 4 brands are prescribed by more than about 65% of doctors. However, many doctors are willing to consider brands they don't prescribe.

More doctors experience cost and formulary availability barriers: Roughly 20-40% of doctors can't prescribe most brands because they're too expensive or not available on formularies.

Low awareness is a problem for some brands: 20-30% of doctors simply haven't heard of 4 of the surveyed brands.

### Insight into 12 Major Asthma/COPD Drugs

Symbicort (budesonide/formoterol; AstraZeneca)

Advair (fluticasone/salmeterol; GSK)

Spiriva (tiotropium; Boehringer Ingelheim)

Tudorza (aclidinium; AstraZeneca)

Anoro (umeclidinium/vilanterol; GSK)

Arcapta (indacaterol; Novartis)

Utibron (indacaterol/glycopyrronium; Novartis)

Seebri (glycopyrronium; Novartis)

Daliresp (roflumilast; AstraZeneca)

Nucala (mepolizumab; GSK)

Xolair (omalizumab; Novartis/Roche)

Breo Ellipta (vilanterol/fluticasone furoate; GSK)

## Exploring Market Access Barriers

Market Access Impact: Asthma/COPD (US) 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 100 US-based pulmonologists and primary care physicians, 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 asthma and/or COPD in total in the last month

We conducted the survey between between June 1st and 5th, 2017.

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