

# Market Access Impact (US) [CLL]

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## Abstracts

How are market barriers moving the goalposts for CLL drugs in US?

Just how significantly are market barriers skewing prescribing behaviour for CLL drugs in the US? One drug is clearly popular and others are playing 'catch-up' on the market share stakes – but what difference would it make if the landscape shifted and non-clinical constraints such as cost, availability, administrative restrictions, institutional guidelines, and patient preferences were removed or changed?

Market Access Impact: CLL (US) examines the dynamics of the CLL drug market in the US. It specifically looks at how various market access barriers are impacting the 6 most popular CLL drugs from Gilead, Janssen Biotech/AbbVie, Novartis, Roche, Roche/Biogen and Roche/AbbVie.

### Top Takeaways

All change for the top brand? Even with alternative options available, one drug has proved popular with oncologists. Will market barriers continue to benefit the market leader at the expense of other drugs? Or is the party over?

Spoilt for choice: Physicians have a choice of effective CLL treatment options, but 1 in 5 prescribing decisions are affected by market barriers. Find out which ones apply to which drugs.

Newest arrival: How is Venclexta faring as the most recent market entrant? Three out of four physicians surveyed cite at least one barrier, some more than one. What is the impact of these barriers?

Look for the positives: Barriers cause oncologists to prescribe other than their

first choice – and for two brands, this is a benefit. Find out how market barriers are an advantage for some.

Not what it seems: A gain of almost 5% thanks to market barriers looks great a first glance for one brand – but there's an almost equivalent loss for the same brand. Find out why.

Different stories: All 6 drugs in the survey are each impacted most by a different market barrier. What should be the priority for individual market access teams?

## Insight into 5 Leading CLL Drugs

Arzerra (ofatumumab; Novartis)

Gazyva (obinutuzumab; Roche)

Imbruvica (ibrutinib; Janssen Biotech/AbbVie)

Rituxan (rituximab; Roche/Biogen)

Venclexta (venetoclax; Roche/AbbVie)

Zydelig (idelalisib; Gilead)

## Lifting the lid on Market Access issues

Market Access Impact: CLL provides an up-to-date assessment of the issues affecting current prescribing patterns for CLL drugs. You'll learn:

### How barriers affect market access

Which CLL brands are physicians prescribing the most?

How are prescribing decisions being affected by market barriers?

Are some barriers having more impact than others?

## 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 choose instead?

Which competing brands does your brand take market share from?

## A Report Based on Expert Knowledge

We surveyed 100 oncologists and haematologists in the US.

All respondents have

Been practising for 2+ years

Prescribed at least one of the listed products

Seen at least 5 chronic lymphocytic leukaemia patients in total in the last month

We conducted the survey between 2nd and 8th May 2017.

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## Contents

- 1. WHAT ARE MARKET BARRIERS?**
- 2. ABOUT THIS REPORT**
- 3. ABOUT THE SURVEY**
- 4. BRANDS INCLUDED IN THE SURVEY**
- 5. EXECUTIVE SUMMARY**

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