

# Market Access Impact (US) [NSCLC]

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## Abstracts

Eliminating market barriers could help lower-ranked brands a narrow lead

Three brands are way ahead in the US non-small cell lung cancer (NSCLC) market, thanks in part to market barriers that prevent oncologists from prescribing competing treatments. Eliminating these barriers won't be enough for lower-ranked brands to catch up to the market leaders, but it could give a few of them the market share bump they need to overtake their closest rivals.

Get the details in Market Access Impact: NSCLC (US).

You'll see how widely prescribed your brand is, and learn how 7 barriers affect your market share. You'll also find out how much share you win and lose, who you take share from, and who gets your lost share.

Based on a survey of 100 US-based medical oncologists and primary care physicians, the report covers 13 major therapies from AstraZeneca, Boehringer Ingelheim, Bristol-Myers Squibb, Eli Lilly, Merck & Co., Novartis, Pfizer/Merck Group, and Roche

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## Top Takeaways

Barriers affect nearly 20% of prescriptions: High cost is the biggest issue, but each of the 6 other surveyed barriers affects roughly the same number of prescriptions.

Three brands dominate: Their respective market shares are at most 4% apart. However, significantly more doctors prescribe the top two brands than the third-place runner-up.

A battle of inches: Barriers only have a modest effect on market share, but it's enough to hold at least two brands back. Eliminating barriers would push each of them up by one spot.

Problem areas: Some barriers have an outsized effect on some brands, e.g., high cost is the issue for one leading brand, while two lower-ranked rivals, have big reimbursement problems.

Barrier effect is widespread: At least 50% of doctors experience one or more barriers with every surveyed brand.

Overall perception is good: Most doctors either prescribe, or would consider prescribing all of the surveyed brands, and no more than 5% of doctors are unaware of any given brand.

## Insight into 13 Major NSCLC Drugs

Avastin (bevacizumab; Roche)

Alecensa (alectinib; Roche)

Cyramza (ramucirumab; Eli Lilly)

Gilotrif (afatinib; Boehringer Ingelheim)

Iressa (gefitinib; AstraZeneca)

Keytruda (pembrolizumab; Merck & Co.)

Opdivo (nivolumab; Bristol-Myers Squibb)

Portrazza (necitumumab; Eli Lilly)

Tagrisso (osimertinib; AstraZeneca)

Tarceva (erlotinib; Roche)

Tecentriq (atezolizumab; Roche)

Xalkori (crizotinib; Pfizer/Merck Group)

Zykadia (ceritinib; Novartis)

## Exploring Market Access Barriers

Market Access Impact: NSCLC (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 medical oncologists, 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 16th, 2017.

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