

# Market Access Impact (US) [RCC]

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## Abstracts

Who wins when high costs drag the leading brand down?

Market barriers affect nearly a quarter of renal cell carcinoma (RCC) prescriptions in the US. High costs especially are preventing oncologists we surveyed from prescribing some brands. Are they costing your brand market share, or are you winning share from more expensive competitors? Which other barriers are keeping doctors from prescribing your brand?

Get the answers in Market Access Impact: RCC (US).

Based on a survey of 100 medical oncologists, the report covers 10 major therapies from Amgen, Bayer, Bristol-Myers Squibb, Eisai, Exelixis, Novartis, Pfizer, and Roche. Handy graphs and charts show you how 7 barriers affect your market share, revealing which competitors you gain share from, and lose it to.

### Top Takeaways

Cost is dragging the leading brand down: It sees the biggest barrier-related share loss—mainly because it's too expensive.

Some brands win when costs are high: The brand that sees the biggest net share gain owes nearly a third of it to other brands being too expensive.

Many doctors experience few barriers: 70 percent or more of surveyed doctors experience no more than one barrier with any of the surveyed brands.

Barriers affect nearly a quarter of prescriptions: Cost and market access barriers affect more prescriptions than all other barriers combined.

Hidden volatility: While the net effect is modest, many brands see significant share losses and gains. Win/loss breakdowns can help you spot—and exploit—competitors' weaknesses.

Doctors are open to alternatives: most are willing to consider brands they don't currently prescribe.

### Insight into 10 Major RCC Drugs

Afinitor (everolimus; Novartis)

Avastin (bevacizumab; Roche)

Cabometyx (cabozantinib; Exelixis)

Inlyta (axitinib; Pfizer)

Lenvima (lenvatinib; Eisai/Novartis)

Nexavar (sorafenib; Bayer/Amgen)

Opdivo (nivolumab; Bristol-Myers Squibb)

Sutent (sunitinib; Pfizer)

Torisel (temsirolimus; Pfizer)

Votrient (pazopanib; Novartis)

### Exploring Market Access Barriers

Market Access Impact: RCC (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 RCC in total in the last month

We conducted the survey between April 3rd and 7th, 2017.

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*Market Access Impact (US) [RCC]*

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