Market Access Impact (US) [Cancer Pain]
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Market Access Impact (US) [Cancer Pain]

Find out why doctors can’t prescribe your brand, and what you can do about it

Market barriers affect nearly a quarter of cancer pain prescriptions in the US, and most brands lose market share because of them. According to the medical oncologists we surveyed, that’s a problem with no single solution; many of them experience as many as 3 different barriers with any given brand, and for some brands that grows to 4.

Find out which barriers cost your brand the most market share, which competitors are taking it from you, and what you can do to win it back, in Market Access Impact: Cancer Pain (US).

Based on a survey of 100 medical oncologists, the report covers 6 major therapies from Teva, Mallinckrodt, Endo Pharmaceuticals, Purdue Pharma and Insys Therapeutics. Handy graphs and charts show you how 7 barriers affect your market share, revealing which competitors you gain share from, and lose it to.

Based on a survey of 150 medical oncologists from the EU5 countries (France, Germany, Italy Spain, UK), the report covers 10 major therapies from AstraZeneca, Boehringer Ingelheim, Bristol-Myers Squibb, Eli Lilly, Merck Sharpe & Dohme, Novartis, Pfizer/Merck Group, and Roche.

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Top Takeaways

Most brands lose out. While every brand wins and loses share because of barriers, 5 of the 6 surveyed brands see a net loss.

One brand leads the table, another can’t catch a break. Find out which brand sees a net share gain from every other surveyed brand, and which one sees a net loss to every other brand.

No single barrier is to blame. 17% to 25% of surveyed doctors experience 3 or more barriers with the surveyed brands, with some experiencing 4 barriers.

Some brands have a perception problem. Up to 20% of doctors either wouldn’t consider prescribing five of the surveyed brands, or haven’t heard of them at all.

Cost is a huge problem for five brands. Between 25-40% of doctors experience cost barriers with these five brands. That’s at least 15% more than the leading competitor.
Insight into 6 Major Cancer Pain Treatments

Actiq (fentanyl transmucosal; Teva)
Exalgo (hydromorphone CR; Mallinckrodt)
Opana (oxymorphone IR; Endo Pharmaceuticals)
Opana ER (oxymorphone ER Endo Pharmaceuticals)
Oxycontin (oxycodone CII; Purdue Pharma)
Subsys (fentanyl sublingual; Insys Therapeutics)

Exploring Market Access Barriers

Market Access Impact: Cancer Pain (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 September 1-12, 2017

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FirstWord Reports deliver timely, need-to-know intelligence about your products, your competitors and your markets. Covering biosimilars, market access, medical affairs, sales & marketing, technology and therapy areas, FirstWord Reports provide expert views and intelligence on the challenges facing pharma today.

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