RealWorld Dynamix
Exploring the Patient Journey

Biologic Switching in Rheumatoid Arthritis

OVERVIEW

There are currently eight biologics and one oral janus kinase (JAK) inhibitor approved for the treatment of rheumatoid arthritis (RA) in the United States. With the more established TNF-inhibiting biologics on the market for nearly two decades, RA treatment protocol and payer policy tend to dictate their use as first-line biologics. However, US rheumatologists estimate that every year, roughly one-quarter of their RA patients treated with biologics or Xeljanz are switched from one biologic/JAK to another. Treatment protocols for second-line (and subsequent line) therapies are less stringent, resulting in a dynamic switching segment. This study provides independent analysis of the switching segment, as the key driver and predictor of future brand share, delivering intelligence that is critical to informing commercial decisions.

SAMPLE & METHODOLOGY

This report is based on an online survey of 198 board certified US rheumatologists combined with a retrospective analysis of 980 RA patient records. Each physician completes an in-depth medical history of 3-7 RA patients switched from one biologic (or Xeljanz) to a different brand in the past three months.

KEY QUESTIONS ANSWERED

- What is the patient profile of the typical RA "switch" patient, including demographics, co-morbid conditions, risk factors, concomitant treatments, lab values, and other information?
- What drives biologic switching in RA and how does it differ by drug class and specific brands?
- What do switch segment dynamics and physician intended use tell us about the future market share of approved brands?
- How much influence does the patient have in the decision to switch biologic/JAK brands?
- How do physicians determine success, over what time frame, and what are the next steps in the treatment algorithm?
- What are the areas of opportunity and threat for the RA biologic brands and Xeljanz?
- What is the awareness of the drugs in development and perceived positioning relative to others in the market?

Products Profiled:

Commercial Products:
Genentech's Actemra (tocilizumab), UCB's Cimzia (certolizumab), Amgen's Enbrel (etanercept), AbbVie's Humira (adalimumab), BMS' Orencia (abatacept), Janssen's Remicade (infliximab),Biogen Idec's Rituxan (rituximab), Janssen's Simponi (golimumab), Pfizer's Xeljanz (tofacitinib)

Pipeline Agents:
Incyte and Eli Lilly's Baricitinib, Regeneron and Sanofi's Sarilumab, GSK and Janssen's Sirukumab

Key Dates:

Report Publishes: April 29th 2016

Deliverables:

- PowerPoint report
- Frequency Tables & Summary Statistics
- De-identified database in SPSS or Excel
- On-site presentation

Related Reports:

- RealTimeDynamix: Rheumatoid Arthritis US (Q2, Q3, Q4 2016)
- June 30th
- September 30th
- December 30th

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