



Disease Modifying Agents in Psoriasis

OVERVIEW

The market for Psoriasis (PsO) therapies is predicted to grow by nearly 66% by 2023, when it will be worth \$3.7 billion, due to the continued uptake of the premium-price biologics and novel therapies expected to launch over the period. This growth will be driven by a growing treatment population and the continued uptake of biologics and advanced therapies.

The strategic focus of this report is to provide a robust and independent insight into patient profile differences for the key products and to build an accurate picture of current and future use for approved and pipeline drugs in order to inform commercial decisions. The combination of deep survey and large chart review provides a unique insight into perceived and actual use.

SAMPLE & METHODOLOGY

This report is based on an online survey of ~200 practicing Dermatologists in the US combined with a retrospective analysis of ~1000 patient records. Based on the ranking of drug use each physician completes an in-depth medical history of their last five patients who met inclusion criteria (patients recently initiated on or switched a disease modifying treatment). For the top 5 products used this will result in ~110 profiles for each. The patient pathway is retrieved back to the first referral with a more intensive analysis of the past twelve months. In addition to patient demographics and treatment history, clinical value drivers (e.g. number of relapses, changes in PASI scores, PGA, mean BSA improvement) are included to provide insight.

KEY QUESTIONS ANSWERED

- How do the patients differ between disease modifying treatments?
- In what sequence are patients prescribed biologics for Psoriasis and why?
- What drives switching and at what dose levels do patients move off one drug to an alternative?
- What will Physicians prescribe next when current treatments fail and how does this alter the future market dynamics?
- Awareness of and projected use of drugs in the pipeline?

Products Profiled:

Cosentyx(Novartis),
Enbrel(Amgen),Remicade
(Janssen), Humira(Abbvie),
Stelara (Janssen),
Otezla(Celgene), Simponi
(Janssen), Cimzia(),
Taltz(Lilly),Orencia(BMS),
Guselkumab(Janssen), BI
655066 (BI/Abbvie),
Tildrakizumab (Merck)

Key Dates:

April 25th – *Deadline for client comment and input*
May - *Research in field*
July 1st - *Publication*

Deliverables:

- PowerPoint report
- Frequency Tables & Summary Statistics
- Transcriptions of qualitative interviews
- On-site presentation

Related Reports:

RealTime Dynamix - Psoriasis 2016
RealTime Dynamix – PsA and Rheumatology 2016 – Monthly Market Dynamix Scleroderma - July 2016
Real World Dynamix – Biologic switching in PsA – EU 2016