



## Biologic/Otezla Switching in Psoriasis (US)

### 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 an increase treatment population and the continued uptake of biologics and advanced therapies.

**RealWorld Dynamix™: Biologic/Otezla Switching in Psoriasis (US)** will help you to understand the drivers of treatment switches in this volatile market. By analyzing only recent switches, real insights into prescribing behavior can be unearthed at the most dynamic end of the market. The resulting data set is a rich source of information and has multiple applications, including the quantitative definition of the winners and losers, by patient segment and recent therapy switches. This report will be an invaluable resource for addressing some of the key strategic issues and opportunities facing brands in the PSO space.

### SAMPLE & METHODOLOGY

**RealWorld Dynamix™: Biologic/Otezla Switching in Psoriasis (US)** is based on a robust and deep patient chart analysis of ~1000 PSO patients who were switched from one biologic or Otezla to a different brand in the past three months. Each physician completes an in-depth medical history of their last five patients who met the study inclusion criteria. An excellent augmentation to claims data, this study also captures the clinician's perspective on why the switch was made and the new brand chosen as well as future intentions should the response be suboptimal. In addition to patient demographics and treatment history, clinical assessments, diagnostic tests and laboratory values are included to provide insight into the clinical course of the disease.

### KEY QUESTIONS ANSWERED

- Which products are benefitting and suffering from treatment switch?
- To what extent does market access influence brand choice when switching?
- In what sequence are patients prescribed biologics for Psoriasis and why?
- What factors influence the switch decision and does this vary by patient segment?
- What will Physicians prescribe next when current treatments fail and how does this alter the future market dynamics?
- What role do payers and patients play in the treatment decisions?
- Where do pipeline agents like Janssen's guselkumab and Merck/Sun Pharma's tildrakizumab have the most upside assuming approval?

### Products Profiled

#### Commercial Products

AbbVie (Humira), Amgen (Enbrel), Celgene (Otezla), Eli Lilly (Taltz), Janssen (Remicade, Stelara, Tremfya), Novartis (Cosentyx), Ortho Dermatologics/Valeant (Siliq), Infliximab biosimilars

#### Pipeline Agents

AbbVie/Boehringer Ingelheim (risankizumab), Amgen (Amgevita), Merck/Sun Pharma (tildrakizumab), UCB (bimekizumab, Cimzia)

### Key Dates

- September Publication

*Note: a three day embargo is placed on delivery to non-manufacturers allowing clients time to digest the findings before public dissemination*

### Deliverables

- PowerPoint report with brand specific sections
- Frequency table & summary statistics
- On-site or web-based presentation
- Access to de-identified database
- Analyst support

### Related Reports 2018

- *RealWorld Dynamix™: Biologic/Otezla New Starts in Psoriasis US*
- *RealTime Dynamix™: Psoriasis US*
- *RealWorld Dynamix™: Biologic/Dupixent Use in Atopic Dermatitis US*
- *RealTime Dynamix™: Atopic Dermatitis US*
- *RealWorld Dynamix™: Biologic/Otezla Switching in Psoriatic Arthritis US*
- *RealTime Dynamix™: Psoriatic Arthritis US*
- *RealWorld Dynamix™: Biologic/JAK Switching in Rheumatoid Arthritis US*