



Biologic/Otezla New Starts in Psoriasis (US)

OVERVIEW

The US psoriasis (PSO) market has entered a state of rapid evolution as a steady stream of new, alternative mechanism of action (MOA) biologics has been introduced. In addition, the late stage pipeline promises to deliver even more choice. With a more competitive landscape, manufacturers must focus on driving earlier use of biologics (and alternative mechanism agents) or trigger earlier switches if payer policies relegate newcomers to later lines of therapy. For Celgene's Otezla, a "before biologic" strategy must be executed in order to optimize the brand.

RealWorld Dynamix™: Biologic/Otezla New Starts in Psoriasis (US) is a large scale chart audit which will evaluate patients with psoriasis who are under the care of a dermatologist and who have recently been placed on either Otezla or a biologic agent for the first time. The resulting data set is a rich source of information and has multiple applications, including the quantitative definition of the winners and losers, reasons for choice, patient and payer influence in the new start trends and missed opportunities for each brand. This report will be an invaluable resource for addressing some of the key strategic issues and opportunities facing inline and pipeline brands in the PSO space.

SAMPLE & METHODOLOGY

RealWorld Dynamix™: Biologic/Otezla New Starts in Psoriasis (US) is based on a robust and deep patient chart analysis of ~1000 PSO patients who were started on their first biologic or Otezla within 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 biologic therapy was started and the brand was 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

- What percent of the time is Otezla used prior to biologic exposure and how does this vary based on the dermatologist's perception of the brand?
- How rapidly are alternate MOA biologics moving into the first-line biologic setting? How does the patient profile differ for a patient being started on Otezla vs. a TNF agent vs. an IL-17 or IL-23 agent?
- To what extent does market access influence brand choice in the first-line setting? Which agent would have been chosen if market access were not an impediment?
- What factors influence the decision to begin biologic therapy 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 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), Infleximab biosimilars

Pipeline Agents

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

Key Dates

- April 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 Switching 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*