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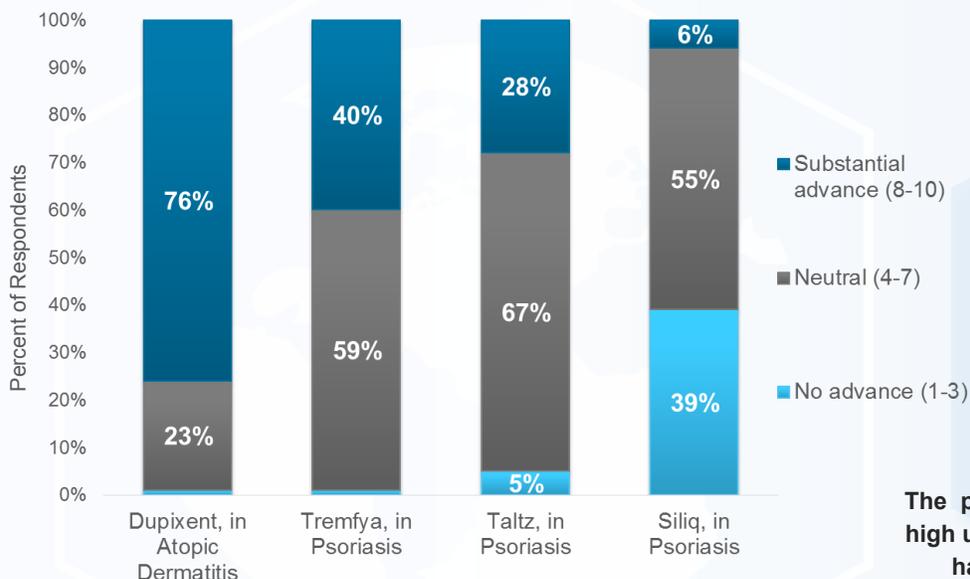
RealTime Dynamix™: Psoriasis US Q3 2017

Over the past two years, four new biologics and multiple biosimilars have been approved for the treatment of Psoriasis in the US, and dermatologists are feeling increasingly overwhelmed with the sheer number of new entrants, according to *RealTime Dynamix™ Psoriasis US Q3*.

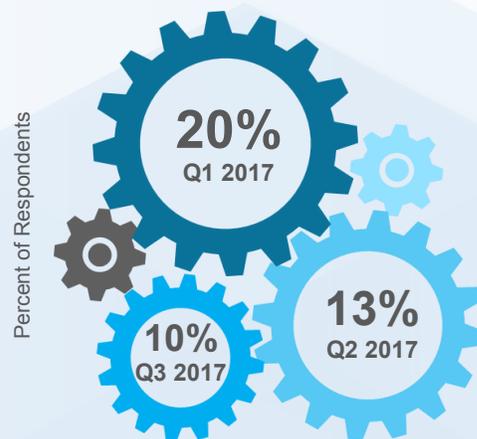
Highlights from this report:

In comparing the most recent launches in PsO and AD, three-quarters of surveyed dermatologists (n=98) cite Dupixent in atopic dermatitis as a substantial advance, however dermatologists are less impressed with the recent additions to the PsO armamentarium

Recent Product Advancements



Shrinking Unmet Need for Pharmacologic Treatments in PsO

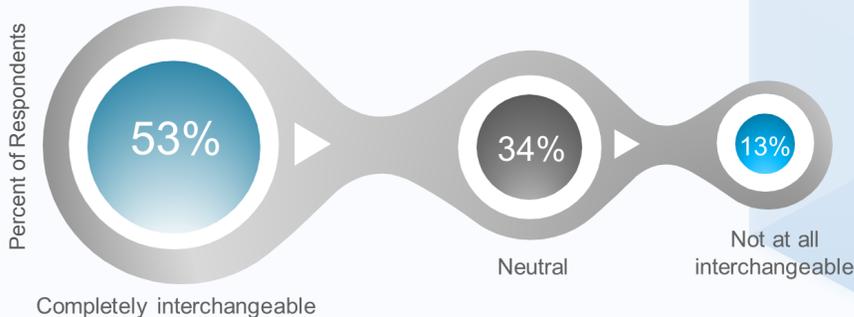


The percentage of dermatologists who believe there is a high unmet need for new PsO pharmacologic treatments has been steadily declining throughout the year.

Additionally, 51% agree that “I have more biologic options for treating PsO than are necessary.”

With the IL-17 inhibitors making up the lion’s share of new approvals, dermatologists are divided about which IL-17 they prefer, as most continue to view Cosentyx and Taltz as largely interchangeable.

Interchangeability of Cosentyx and Taltz



When specifically asked to choose one over another, 56% chose **Cosentyx**, primarily related to **comfort** and **familiarity** with the first-to-market brand, while the remaining respondents chose **Taltz**, overwhelmingly due to the brand’s **efficacy**.

“First in class; personal comfort level”



“Most consistently effective”





Psoriasis (US)

OVERVIEW

The Psoriasis (PsO) market continues to grow, driven by the increasing treatment population and the continued uptake of biologics and advanced therapies. In particular, the IL-17 class shows rapid growth, with the recent introductions of Novartis' Cosentyx, Eli Lilly's Taltz, and Valeant's Siliq. Tracking the interplay of these treatments will be central to the 2017 report series, as well as assessing the impact of potential new market entrants, including Janssen's guselkumab, AbbVie/Boehringer Ingelheim's risankizumab, Merck/Sun Pharma's tildrakizumab, UCB's bimekizumab, and UCB's Cimzia, will undoubtedly impact the ever-evolving psoriasis landscape.

The **RealTime Dynamix™: Psoriasis (US)** report series provides a detailed and timely look at current and future trends in the PsO market and the effects of the future shifting landscape. The quarterly releases allow for close monitoring and trending of key performance metrics. In addition to the fixed trended measures, the report also includes variable content addressing key current issues updated quarterly. The rapid field-to-insight turnaround time, highly relevant content, and unparalleled knowledge of the dermatology market make this an essential tool for companies competing in the space, as well as those with near-term plans to enter it.

SAMPLE & METHODOLOGY

The report is based on an online survey of ~100 US dermatologists and is fielded on a quarterly basis. Respondents are recruited from the Spherix Network, a proprietary group of dermatologists in clinical practice meeting quality screening criteria. Our relationship with this network leads to more engaged respondents resulting in higher quality output.

KEY QUESTIONS ANSWERED

- How will the entrance of Taltz and Siliq impact overall IL-17 class share vs. compete for share with Cosentyx?
- Will dermatologists overcome their struggle to differentiate Taltz from Cosentyx?
- What is the impact of the growing IL-17 class on Stelara and anti-TNF use?
- What is the profile of the growing Taltz patient population?
- What is the awareness of the pipeline agents in phase III and which of them are most anticipated to disrupt the current treatment approach?
- What uptake will there be of Siliq (brodalumab), in the face of warnings and restrictions in the approved label?
- How is Otezla holding ground against the increasingly competitive biologics?

Products Profiled

Commercial Products

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

Pipeline Agents

Bimekizumab, CIMZIA (UCB) Pharma, Tildrakizumab (Sun Pharma/Merck), Risankizumab (AbbVie, Boehringer Ingelheim)

Key Dates

- Q1 March
- Q2 June
- Q3 September
- Q4 December

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
- Frequency Tables & Summary Statistics
- On-site presentation
- Proprietary questions (for purchasers of the annual series)

Related Reports 2017

- RealWorld Dynamix™: Biologic/Otezla Switching in Psoriasis US
- RealTime Dynamix™: Atopic Dermatitis US
- RealTime Dynamix™: Psoriatic Arthritis US
- RealTime Dynamix™: Psoriatic Arthritis EU
- RealWorld Dynamix™: Biologic/Otezla Switching in Psoriatic Arthritis US

Pricing

- \$19,500 single quarterly wave
- \$69,500 annual series of four reports