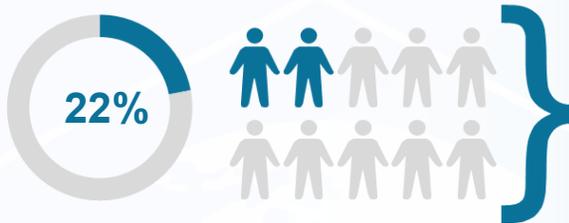


RealWorld Dynamix™: Biologic and Otezla Switching in PsO

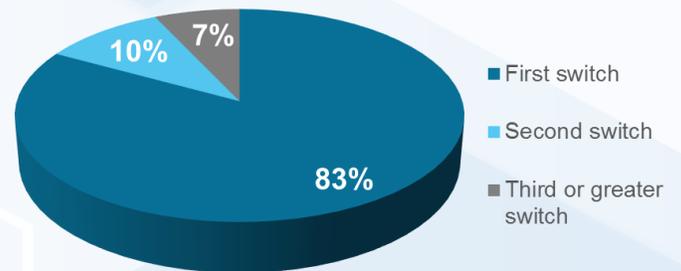
Janssen’s Stelara and Novartis’ Cosentyx take the cake when psoriasis patients switch between biologic/Otezla agents, according to a recent audit of nearly 1,000 recently switched psoriasis patients. Highlights from this report:

US dermatologists estimate that more than 20% of their biologic or Otezla treated PsO patients switch to a different brand within a given year, with the majority of switching occurring between first and second-lines of therapy.

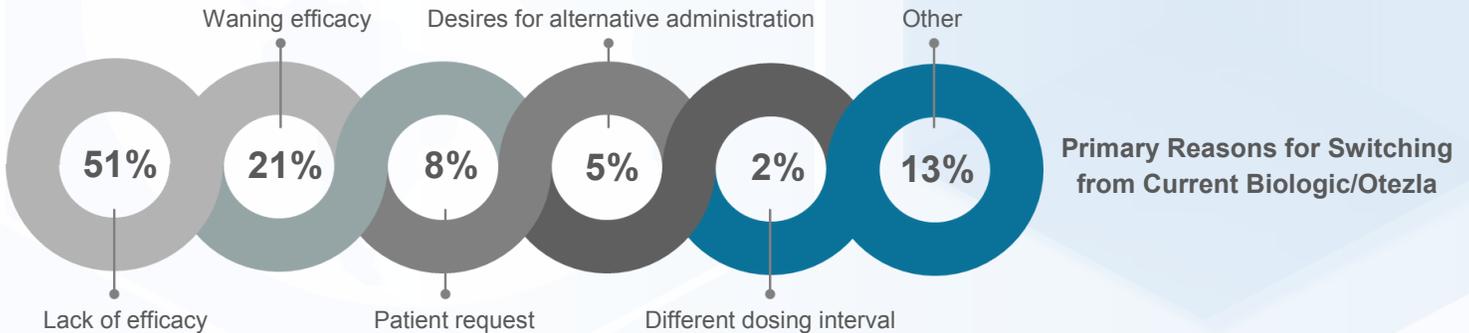
Percent of PsO Patients Treated with Biologics or Otezla Switched in Past Year



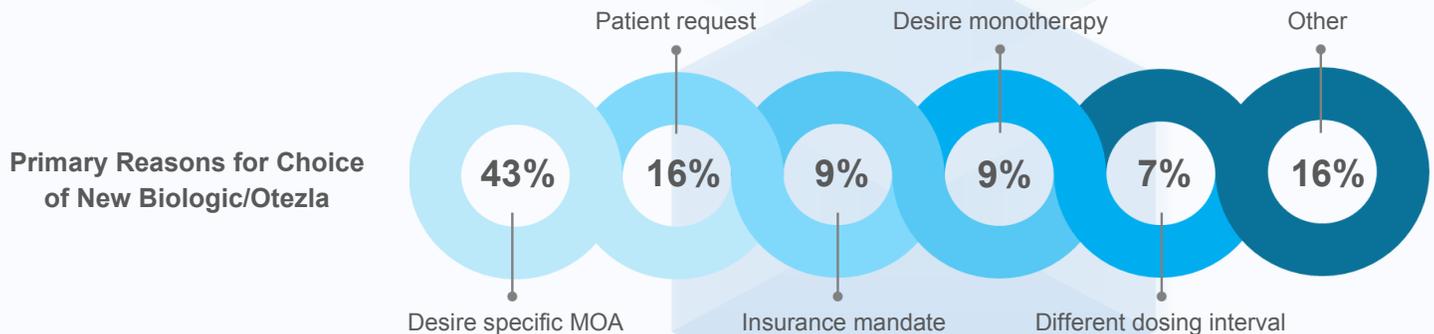
Number of Switches Since Initiation



The most common reasons for switching off a biologic or Otezla are related to a lack of efficacy, with primary failures (lack of initial response) accounting for more than double the switches as secondary failures (waning efficacy).



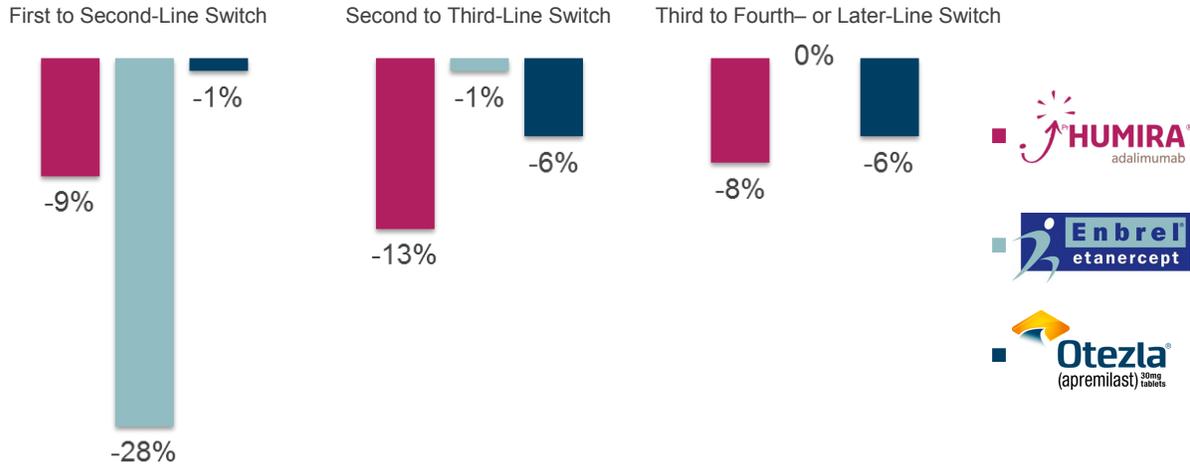
The most cited reason behind selection of the “switch-to” agent is the desire for a specific MOA, while just over one-in-five are primarily attributed to patient requests, which disproportionately favor the oral agent Otezla.



RealWorld Dynamix™: Biologic and Otezla Switching in PsO is a robust and deep patient chart analysis of 950 PsO patients who were switched from one biologic or Otezla to a different brand in the past three months. RealWorld Dynamix™ 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. For more information contact: info@spherixglobalinsights.com

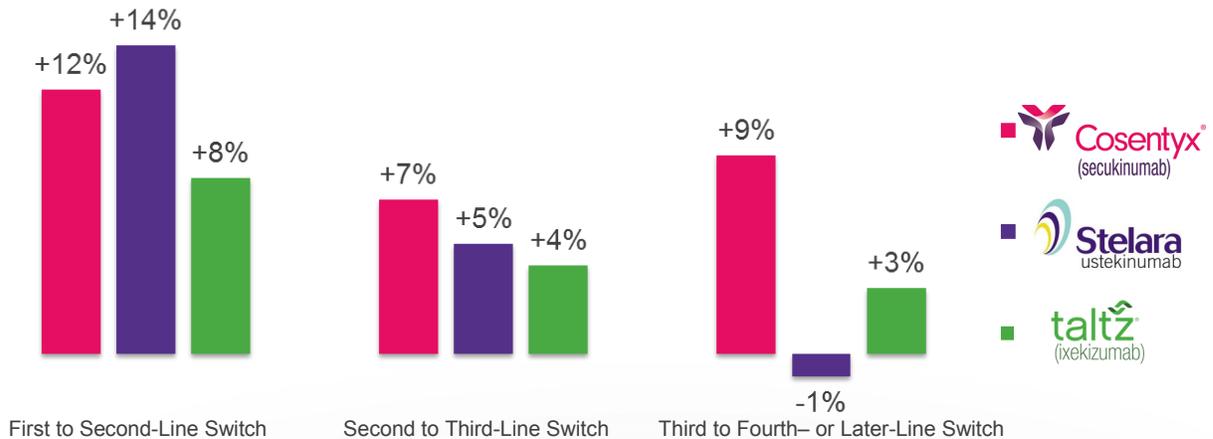
Humira, Enbrel, and Otezla, each with a strong foothold as first-line agents, suffer the greatest overall net losses when PsO switching occurs.

PsO TNF & Otezla Gains/Losses Through Switching Lines of Therapy

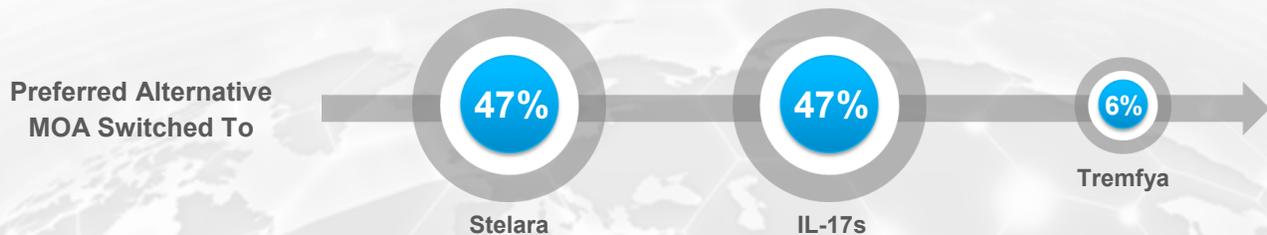


Cosentyx, Stelara, and Taltz largely enjoy gains in market share with each subsequent line of therapy.

PsO AMOA Gains/Losses Through Switching Lines of Therapy



Indeed, when asked about their preference for a non-TNF in psoriasis, the group is almost equally divided between those preferring Stelara versus an IL-17.



Though only 6% of the dermatologists selected Tremfya as their preferred AMOA, the newest IL-23 inhibiting biologic is poised to capture substantial share in the next switch scenario, with nearly one-quarter of all likely next switches going to the brand.



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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, **RealWorld Dynamix™** 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's Humira, Amgen's Enbrel, Celgene's Otezla, Eli Lilly's Taltz, Janssen's Remicade, Simponi & Stelara, Novartis' Cosentyx, UCB's Cimzia, Valeant's Siliq, Janssen's Tremfya

Pipeline Agents

BI/Abbvie's rizenkizumab, BMS' Orenicia, Merck/Sun Pharma's tildrakizumab, UCB's bimekizumab

Key Dates

- September Publication

Deliverables

- PowerPoint report with brand specific sections
- Frequency Table & Summary Statistics
- On-site or web-based presentation
- Copy of de-identified database

Related Reports 2017

- RealTime Dynamix: Psoriasis 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

Pricing

- \$79,500