RealTime Dynamix
Expediting Market Knowledge

Inflammatory Bowel Disease (US)

OVERVIEW

Ulcerative colitis (UC) and Crohn's disease (CD) are common inflammatory bowel diseases (IBD) that currently affect the lives of approximately 1.6 million Americans. The use of biologics has changed the face of treatment for moderate-to-severe IBD patients. However, recent launches, an active pipeline, and the introduction of biosimilars present an opportunity for major future shifts in the IBD landscape. A particular focus for 2018 will be the impact of the expected launch of Xeljanz for UC, the first oral biologic alternative to enter the IBD market.

The ***RealTime Dynamix™: Inflammatory Bowel Disease (US)*** report series provides a detailed and timely look at current and future trends in the IBD 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 IBD 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 gastroenterologists and is fielded on a quarterly basis. Respondents are recruited from the Spherix Network, a proprietary group of gastroenterologists 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

- What are the continued adoption and share trends for Stelara since the late 2016 launch and what products are losing to this new entrant?
- How will the much anticipated launch of oral Xeljanz disrupt the biologic segment and in what line of therapy will it see the most use?
- What will the trajectory of Entyvio be in the face of Xeljanz for UC in addition to the growing competition from Stelara?
- How is the adoption of alternative MOAs changing the practice of sequencing TNF inhibitors?
- What are key barriers across brands?
- What biologic brands do gastroenterologists prefer for specific IBD patient types?
- How do key IBD brands perform on select attributes?
- How is patient preference guiding brand choice?
- To what degree are infliximab biosimilars impacting the use of branded Remicade and what pressure is being placed upon prescribers to utilize biosimilars?
- What can new entrants learn from the current payer access barriers for inline brands in order to plan for successful launches?

Products Profiled

Commercial Products

AbbVie (Humira), Biogen (Tysabri), Janssen (Remicade, Stelara), Merck (Renflexis [infliximab biosimilar]), Pfizer (Inflectra [infliximab biosimilar]), Takeda (Entyvio), UCB (Cimzia)

Pipeline Agents

AbbVie (upadacitinib), Arena Pharma (etrasimod), Celgene (Otezla, ozanimod), Eli Lilly (mirikizumab), Gilead (filgotinib), Pfizer (Xeljanz), Roche/Genentech (etrolizumab)

Key Dates

- Q1 March
- Q2 May
- Q3 August
- Q4 October

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 or web-based presentation
- Proprietary questions (for purchasers of the annual series)
- Analyst support

Related Reports 2018

- *RealWorld Dynamix™: Biologic Switching in IBD US*
- *RealWorld Dynamix™: Biologic New Starts and Restarts in IBD US*
- *RealTime Dynamix™: Inflammatory Bowel Disease EU*
- *RealWorld Dynamix™: Biologic Switching in IBD EU*

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