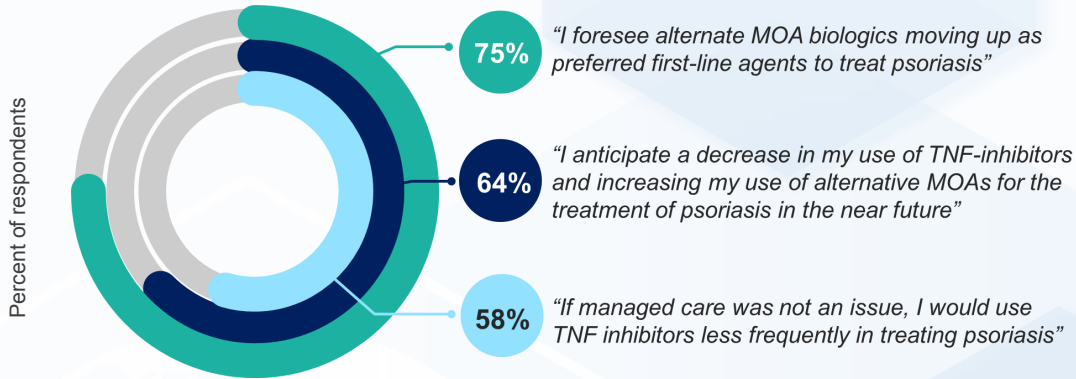


RealWorld Dynamix: Biologic/Otezla Switching in Psoriasis (US) 2018

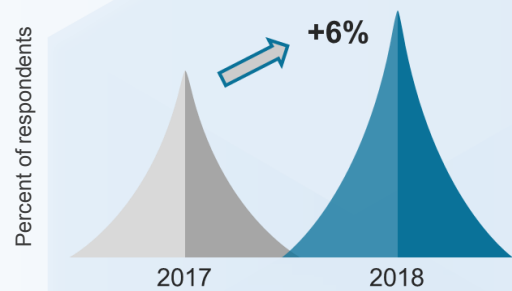
Biologic agents with alternate mechanisms of action (MOA) for the treatment of psoriasis are becoming increasingly popular, according to the second annual edition of Spherix Global Insights' biologic/Otezla switching patient chart audit (n=1,006).

Percent of Dermatologists Who Agree with Statement



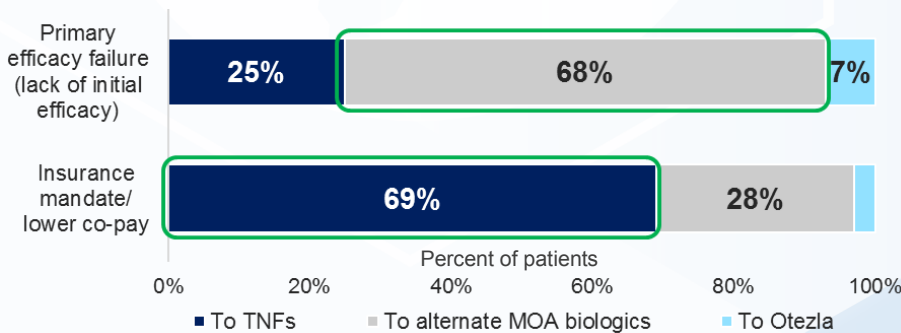
With dermatologists now having increased (and more efficacious) options for psoriasis treatment, it's not surprising the reported annual rate of patients switched from one biologic brand or Otezla to another brand is up significantly over the prior year.

Self-Reported Annual Rate of Biologic/Otezla Switching



When efficacy in skin clearance is the leading driver behind new brand selection, Tremfya and other alternate MOA biologics benefit the most, whereas TNF inhibitors tend to gain when insurance mandates are the primary reason behind new agent selection.

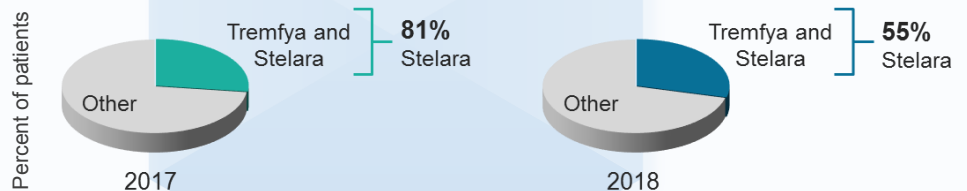
Current Switch-To Agent Based on Primary Reason for Switch



Other reasons analyzed include: secondary efficacy failure (waning efficacy), patient request, desire for alternate form of administration, tolerability issues, concerns about long-term safety, desire for specific mechanism of action, preference for different dosing interval, patient adherence concerns, and risk of infections

Specific agents that patients have switched to in the current audit have largely remained consistent over 2017, apart from Tremfya capturing significantly more switches than the prior year – much to the detriment of sister brand Stelara.

Switch TO Agents: 2017 vs 2018



While Tremfya and Stelara's combined "switch-to" share has remained relatively stagnant, Stelara's piece of that pie has significantly decreased since the prior year.



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*