

Treatment selection in autoimmune: How digital can unlock opportunities for biopharma

Research insights into biopharma's biggest digital health opportunities in biologics for autoimmune conditions

The Challenge

Pairing patients with the right treatment for any chronic condition can be challenging. But for doctors seeking the right drugs for patients with autoimmune diseases, it's like trying to navigate a jungle. That's due, in part, to the inherent complexity of autoimmune conditions, as well as the myriad drugs in the space—with more arriving each year.

Doctors face a few key challenges whether they're treating a patient with rheumatoid arthritis, psoriasis, multiple sclerosis, lupus or other autoimmune conditions—or a combination of conditions.

First, unlike other therapeutic areas where one drug treats a singular condition, many biologics for autoimmune conditions have multiple indications for use. With new drugs coming to market all the time, it can be hard for providers to stay up to date with treatment differentiated value by indication. Additionally, with the FDA recently requiring black box warnings on certain Janus kinase inhibitors (JAKs), healthcare providers struggle to weigh risks against the benefits for patients for whom other drugs haven't worked.

Second, there are simply a lot of biologics on the market. Yet with the standby tumor necrosis factor inhibitors (TNFs) being prioritized on formularies, and patents protecting the existing monopoly drugs against approved biosimilars, it can be hard for new classes and modalities of drugs to gain traction—even if they're a more appropriate match for a patient's clinical or financial needs.

Finally, healthcare providers who treat autoimmune conditions of all kinds will tell you that another major barrier to finding the right treatment is that, unlike other treatment areas, these chronic conditions depend on accurate self-reporting by patients. Providers must rely on patients' self-defined assessments of feeling good, better, or at their best when they take a specific drug, and many providers are stuck relying on antiquated, paper-based symptom tracking that only captures a moment in time and doesn't give any insights into quality-of-life metrics.

Treatment Jungle in Autoimmune



MULTI-INDICATION NEEDS

PATIENTS WITH
MULTIPLE
AUTOIMMUNE
ISSUES



INSURANCE REQUIREMENTS

ADVANCE TO
PREFERRED DRUGS
VIA TRY & FAIL



FDA UPDATES

WEIGHING BLACK
BOX RISKS VS.
GAINS OF JAK
INHIBITORS



PATIENT ADMINISTRATION NEEDS

INJECTION SITE
MANAGEMENT



FDA UPDATES

CHALLENGE OF TX
CHOICE GIVEN
NEW ENTRANTS



PATIENT ADMINISTRATION NEEDS

DOSING SCHEDULE,
REFRIGERATED
DRUGS



MULTI-INDICATION NEEDS

WHICH DRUG
OPTIMIZES DISEASE
MANAGEMENT



INSURANCE REQUIREMENTS

TNF BLOCKERS
MOST ACCESSIBLE



BrightInsight



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"Because spaces are crowded and drugs are expensive, payers are trying to pick horses and narrow the field or make it difficult to get products. As a result, access for providers and patients is difficult, constraining and confining."

– Vice President, Head of Value & Access at a top 10 biopharma company

The Opportunity

BrightInsight conducted a targeted research study among clinicians and biopharma professionals to identify the highest-value digital opportunities for biopharma companies in the autoimmune space. Far and away, the standout use case was treatment selection.

Treatment selection solutions are perceived to offer high value for all healthcare stakeholders, especially pharma, as there are currently few existing tools in the market, and the differentiation for a brand with such a tool would be significant.



"It's still unclear to HCPs. They have 10 to 12 disease-modifying antirheumatic drugs (DMARDs) and 6 different mechanisms of action (MOAs), so which patient will respond better to which? An algorithm would be incredibly helpful."

– Vice President, Global Therapy Lead at a top 15 biopharma company

Here are a few key takeaways:

- Because conditions like rheumatoid arthritis, ulcerative colitis, atopic dermatitis and psoriasis are so prevalent, doctors are familiar with treating them. But that doesn't always ensure a smooth path to treatment selection. Many patients with these conditions have cross indications, making it difficult to initiate and sequence the right treatment plan.
- Less common diseases like Sjogren's, vasculitis and alopecia affect fewer patients, of course, but also have bigger hurdles to finding the right treatment. It can take years for providers to pinpoint the right diagnosis—and once they do, there are fewer drug options available. Better treatment selection tools can help patients avoid suffering through trial and error, and return to a better quality of life sooner.
- Biologic treatments require significant education, training and lifestyle adjustments, which make them a clear fit for digital solutions that can help ease the burden and differentiate the drug.
- The nature of autoimmune conditions means patients will likely need multiple biologics over the course of their disease, making treatment selection solutions an ongoing benefit for providers.



"We should be growing faster, acquiring more patients. Marketing budget is not enough to solve upstream challenges. Relying on TV ads is a brute force approach, but what is required is a surgical approach: How do we get patients paired with the right doctor, healthcare system and drug? It takes time and resources, but the brand lifecycle is finite. How do you get more patients on your brand? Digital."

– Data Science & Artificial Intelligence lead at a top 10 biopharma company

The Solution

Not only does technology enable new and better biologics to come to market every day, but it also makes it possible to streamline the development of digital solutions that help healthcare providers match patients to the right treatments.

Patient- and provider-facing digital solutions, whether a user-friendly patient app or a powerful algorithm, put invaluable tools at the point of care, enabling more strategic treatment selections and better patient outcomes.

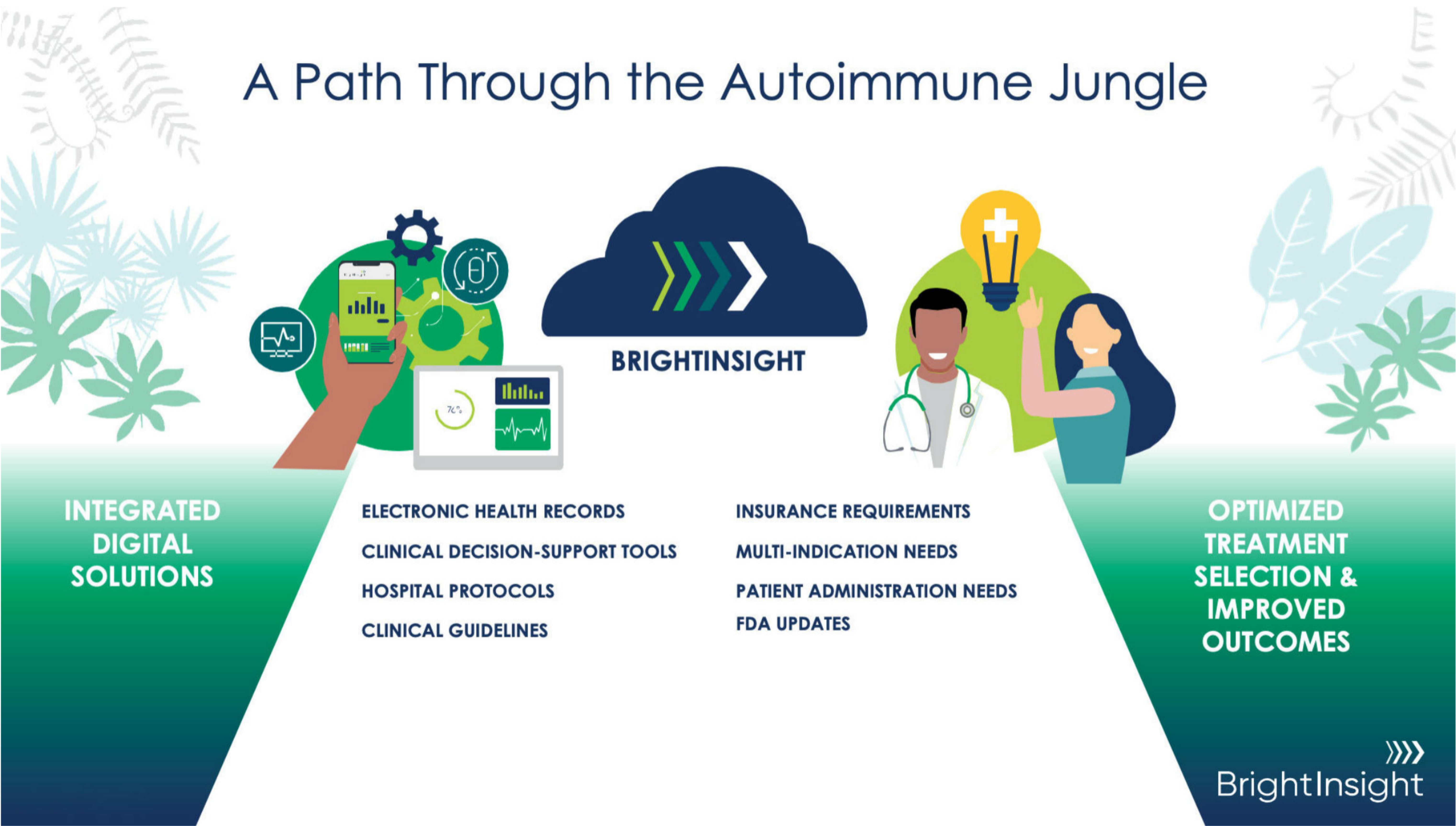
When health care providers have the data and insights they need to better navigate the complex landscape of autoimmune treatments, everybody benefits. Providers can sidestep the often frustrating trial-and-error process of prescribing treatments. Patients receive better care and enjoy a better quality of life. And biopharma companies unlock the real-world evidence that encourages payers to cover their treatments, which in turn helps get their drugs prescribed to the patients who will benefit from them the most.

5 ways digital enables better treatment selection

1. **Data collection:** User-friendly patient apps turn sporadic symptom tracking into regular quality-of-life assessments, creating continuity between appointments and enabling more accurate clinical decision making.
2. **Data integration:** Busy doctors navigate multiple data sources, all accessed with different systems and login credentials. With a digital platform that integrates Electronic Health Records (EHRs), real-time patient data and the latest news on clinical trials, treatment selection is streamlined.
3. **Data contextualization:** Powerful algorithms can instantly synthesize data from multiple sources and provide personalized treatment recommendations based on each individual patient's condition. As patients inevitably change treatments over time, these algorithms can help providers plan care pathways.
4. **Data aggregation:** When providers can access population-level data and trends, they can better predict which treatment may work best for each individual patient. And when all this data is available in one streamlined dashboard, that frees up time that can be spent face to face with patients.
5. **Data communication:** A compliant digital platform enables better clinical documentation for payers and secure communication—a must for patients who see multiple doctors for the treatment of an autoimmune condition.

Better treatment selection is possible with BrightInsight

BrightInsight provides the platform that leading biopharma companies trust with their regulated digital health solutions, including patient-facing apps, clinician portals and hosting powerful treatment selection algorithms.



With patient-level insights, population-level data and clinical trial outcomes available on a single dashboard, doctors providing care to autoimmune patients are better equipped to pair the right patient with the right drug.

And the insights gained from an integrated, contextualized, aggregated and compliant digital health platform enable biopharma companies to better understand how providers are prescribing, and how patients are responding—unlocking better treatments in the future.

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"With digital tools, you have the opportunity for a feedback loop, and to continuously improve the models going forward. This helps us determine in which occasions medicines don't work, so we can start developing the next generation of treatments. If we can get that feedback loop faster, we can react much faster to the medical need."

— Oncology executive at a leading life sciences company



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Based in Silicon Valley with teams all over the globe, BrightInsight is backed by leading healthcare and technology VCs. Our leadership team brings over 100 years of combined digital health experience in the biopharma and medtech industries.

Our vision is to transform patient outcomes globally by bringing the power of digital technology to healthcare, and we work every day to achieve this by accelerating regulated digital health innovation for our customers through our scalable medical-grade platform.

We are the launch partner and underlying platform for the world's leading biopharma companies. Our clients trust BrightInsight to accelerate time to market for their regulated digital health products, including apps, algorithms, medical devices, connected combination products, companion diagnostics and SaMD.

