



IBD Segmentation

Objectives: Segment IBD treaters to understand adoption of new treatments



Archetypes: Profile IBD treaters to understand their defining attitudes and behaviors



Adoption: Understand treatment patterns to understand adoption of new IBD treatments



Prioritization: Identify high-potential Gastroenterologists most likely to embrace new IBD treatments

Methodology: Segments developed from online survey of N=172 IBD treaters in the US

Methodology

Quantitative methodology:
15-minute online survey

Audience: US Gastros
who treat IBD

Robust base sizes:
N=172 Gastroenterologists



*Rigorous statistical
analysis*

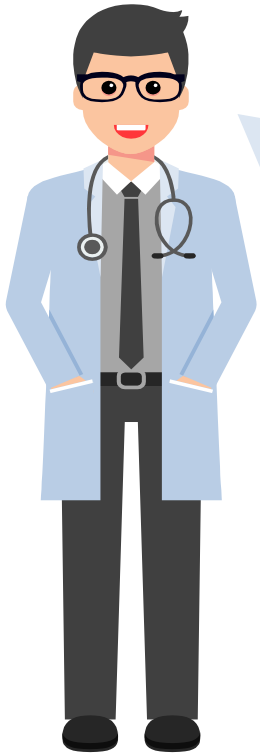
Output



Differentiated
and actionable
segments

Physician segments: Three common archetypes among IBD treaters

Expert Early Adopters



I see a **large number** of IBD patients and I'm **more aware** of pipeline treatments. I am often one of the **first to adopt** new treatments.

Community Moderates



I'm **not one of first** to use new treatments, but I'm willing to once they are **used by others**. I see the **fewest number** of IBD patients.

Bottom-up Followers



I **reserve more potent therapies** for later in my algorithm, I'm focused on **reducing clinical symptoms** and I'm often one of the **last to adopt** new IBD treatments.

Segment vectors: Archetypes are differentiated across three key dimensions

Patient population

- # of IBD patients seen
- IBD patient severity



Treatment approach

- Adoption of new treatments
- Top down vs. bottom-up
- Symptom relief vs. endoscopic remission
- Impact of guidelines

Pipeline familiarity

- IBD trial participation
- Pipeline familiarity

Segmentation overview: Meet the IBD archetypes



Expert early adopters

Community moderates

Bottom-Up followers

Summary

I see a large number of IBD patients and I'm more aware of pipeline treatments. I am often one of the first to adopt new treatments.

I'm not one of first to use new treatments, but I'm willing to once they are used by others. I see the fewest number of IBD patients.

I reserve more potent therapies for later in my algorithm, I'm focused on reducing clinical symptoms and I'm often one of the last to adopt new IBD treatments.

Patients

Sees the **highest # of patients** per month
Sees the **highest % of severe** IBD patients

Sees the **lowest # of patients** per month

Sees the **highest % of mild** IBD patients

Pipeline familiarity

Highest participation in IBD clinical trials
Most aware of pipeline medications

Lower participation in IBD clinical trials
Lower awareness of pipeline medications

Almost never participates in IBD trials
Least aware of pipeline medications

Treatment approach

Earliest adopter of new IBD medications
Least guideline-driven in treating IBD

Neutral adopters of new IBD medications
Highest tendency to **treat top-down**

Latest adopter of new IBD medications.
Highest tendency to **treat bottom-up**.
Most focused on **symptom relief**.



Segment profile: Expert early adopters

Demographics

"I see a **large number** of IBD patients, and a higher proportion of my patients have **severe IBD**."

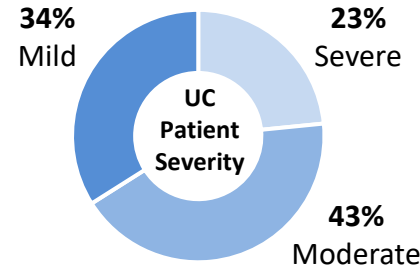
21%

Of IBD treaters are Expert Early Adopters

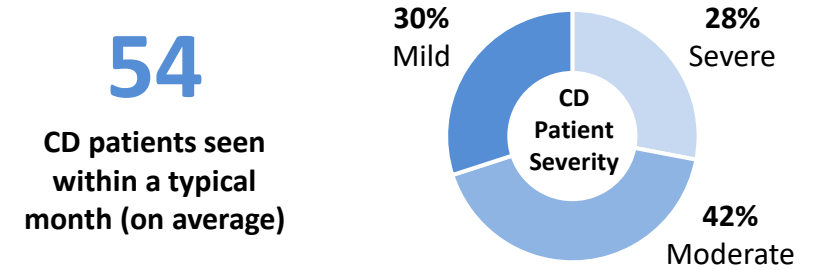
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UC patients seen within a typical month (on average)

Ulcerative Colitis



Crohn's Disease



54

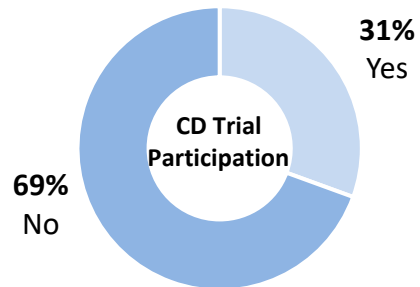
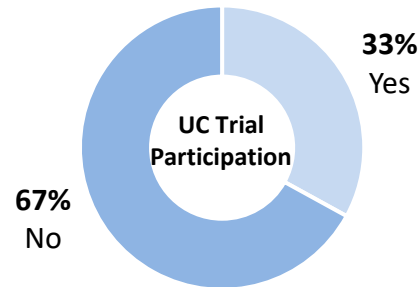
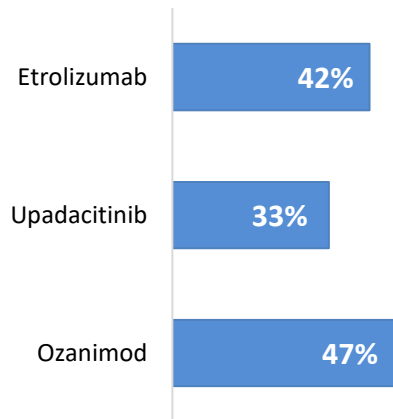
CD patients seen within a typical month (on average)

Pipeline familiarity

"I tend to **participate in IBD trials**, and I am generally familiar with **pipeline IBD treatments**."

Familiarity (pipeline meds)

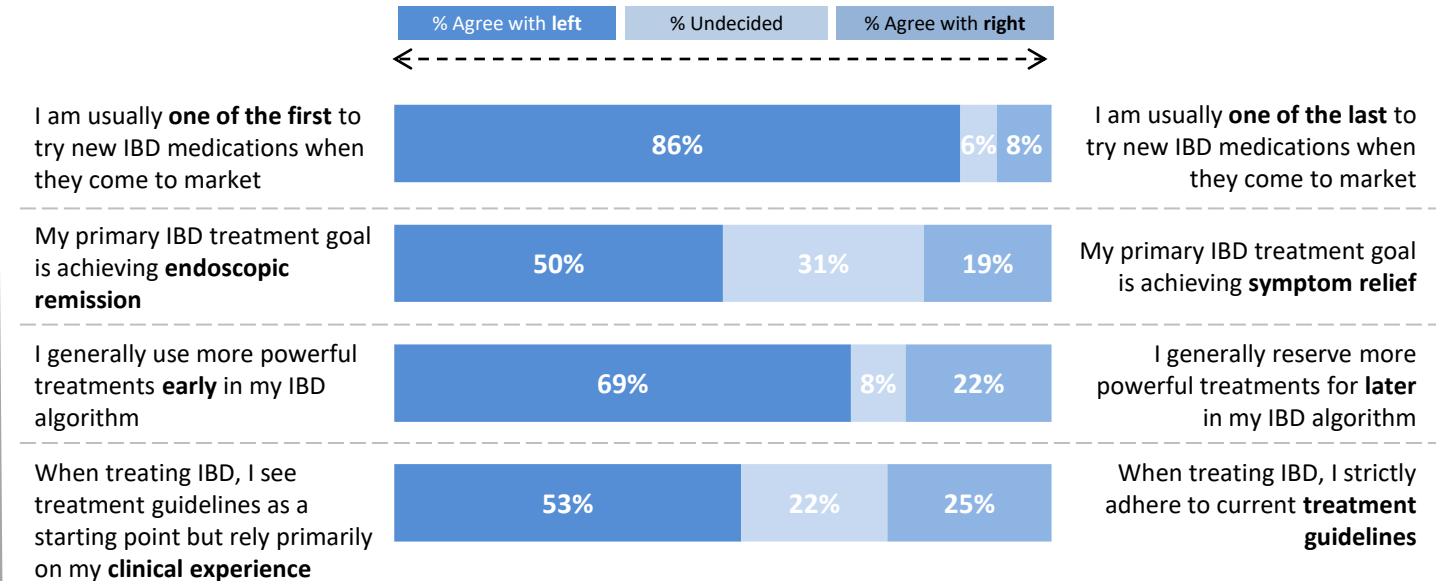
Familiarity = Very familiar + familiar



Treatment approach

"I am an **early adopter** of new IBD medications and rely more on my **clinical experience** than treatment guidelines."

Treatment approach





Segment profile: Community moderates

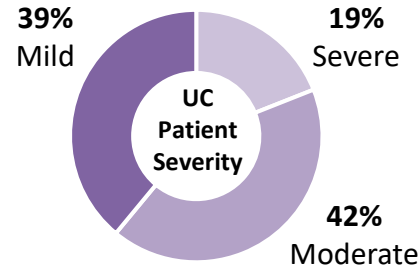
Demographics

"On average, I see a **low number** of IBD patients per month."

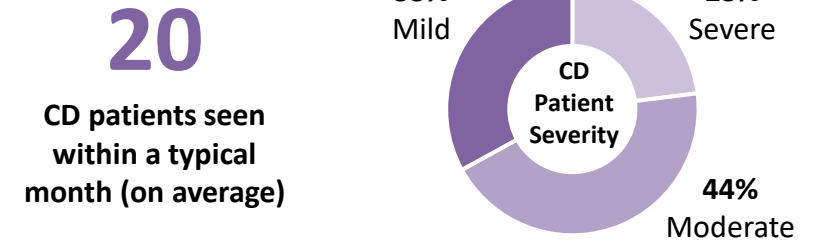
49%
Of IBD treaters are Community Moderates

21
UC patients seen within a typical month (on average)

Ulcerative Colitis



Crohn's Disease

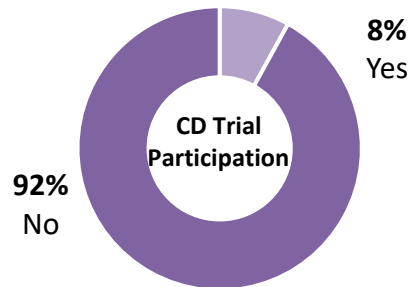
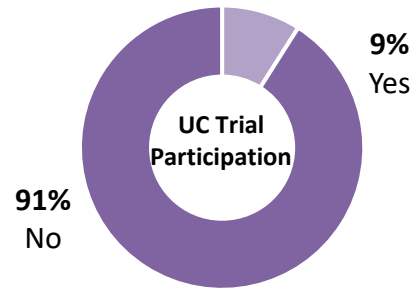
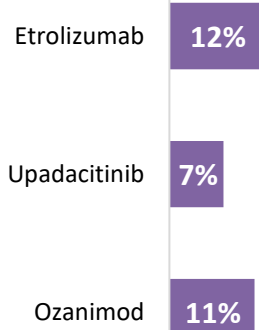


Pipeline familiarity

"I rarely **participate in IBD trials** and I have little familiarity of **pipeline IBD treatments**."

Familiarity (pipeline meds)

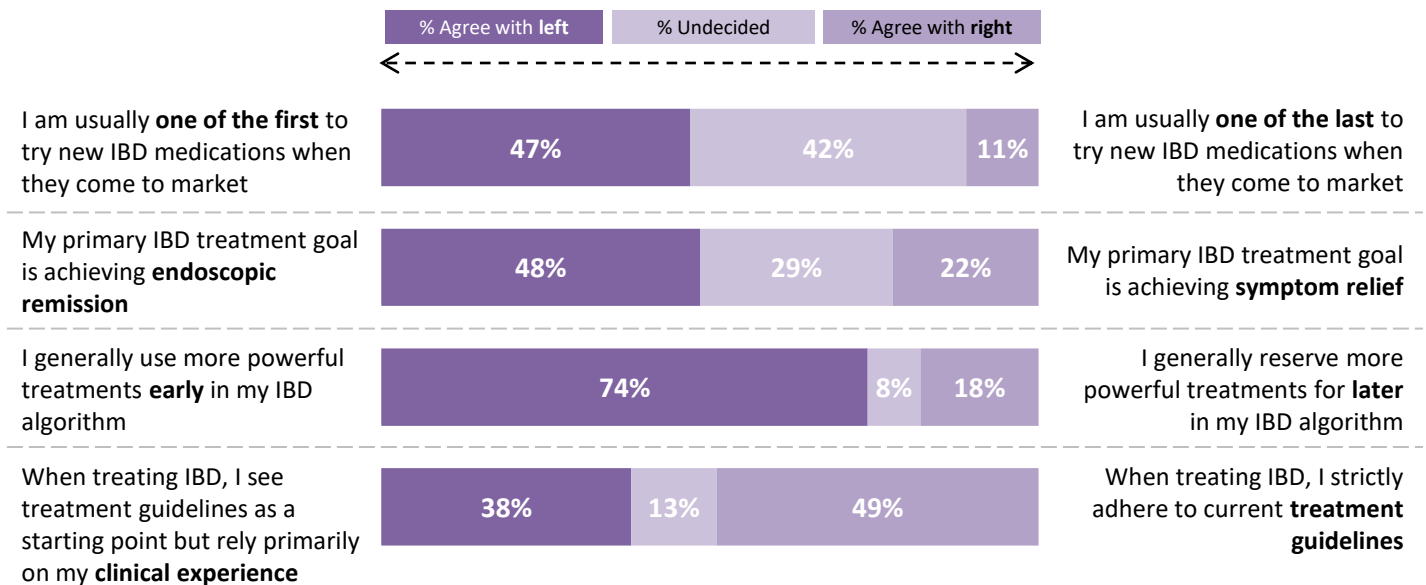
Familiarity = Very familiar + familiar



Treatment approach

"I tend to treat my patients **top-down** and usually **wait for the experts** to try new medications before I do."

Treatment approach





Segment profile: Bottom-up followers

Demographics

"I have the highest percentage of **mild IBD patients**, as compared with the other segments."

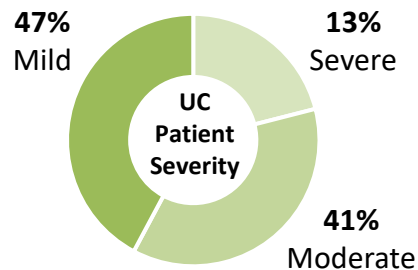
30%

Of IBD treaters are Bottom-up Followers

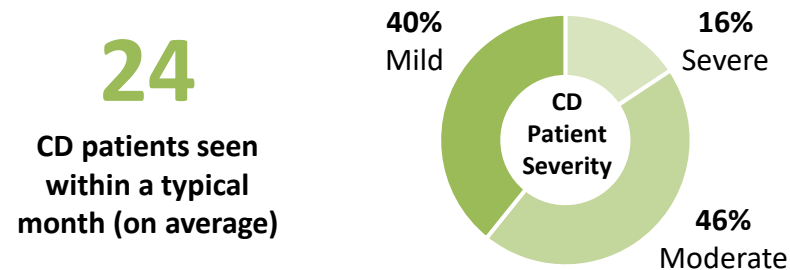
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UC patients seen within a typical month (on average)

Ulcerative Colitis



Crohn's Disease

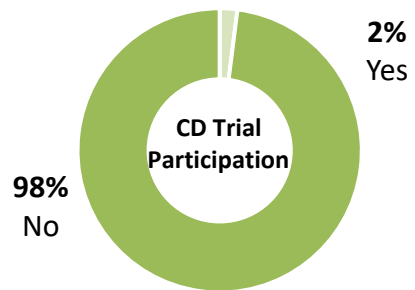
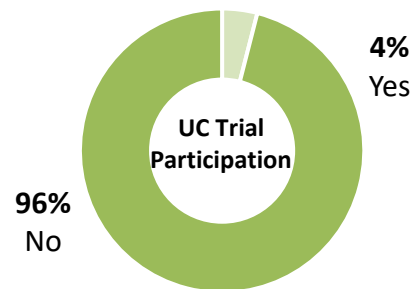
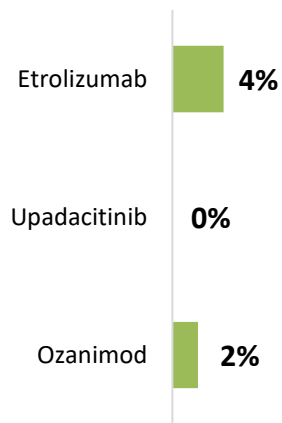


Pipeline familiarity

"I almost **never participate** in IBD trials and I have **little to no familiarity** of pipeline IBD treatments."

Familiarity (pipeline meds)

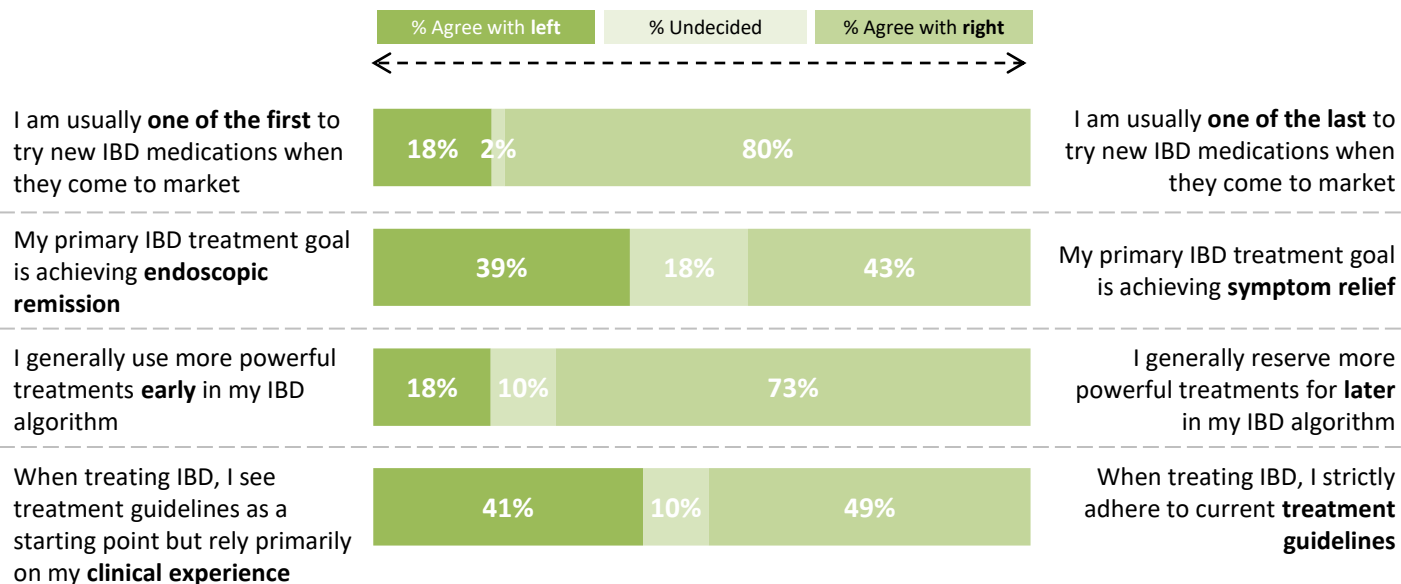
Familiarity = Very familiar + familiar



Treatment approach

"I tend to be a **late adopter** of IBD treatments, treat **bottom-up** and focus on **symptom relief** as a treatment goal."

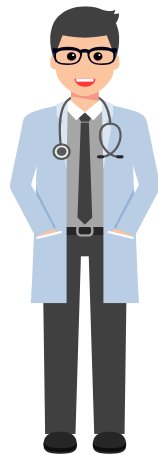
Treatment approach



Comparing segments

In this section, we contrast segments to identify unique characteristics of each archetype

**Expert Early
Adopters**



**21% of
IBD Treaters**

**Community
Moderates**



**49% of
IBD Treaters**

**Bottom-up
Followers**



**30% of
IBD Treaters**

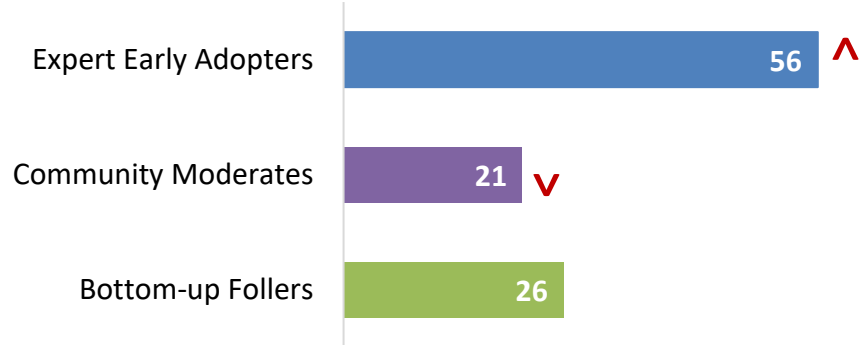
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VS

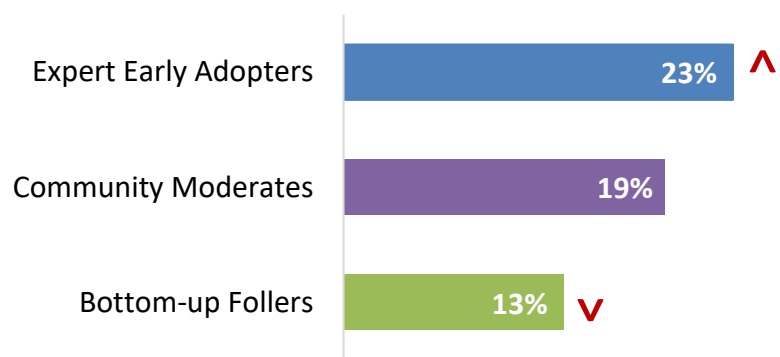
Patient population comparison across segments

UC patient demographics

Mean # of UC patients seen per month

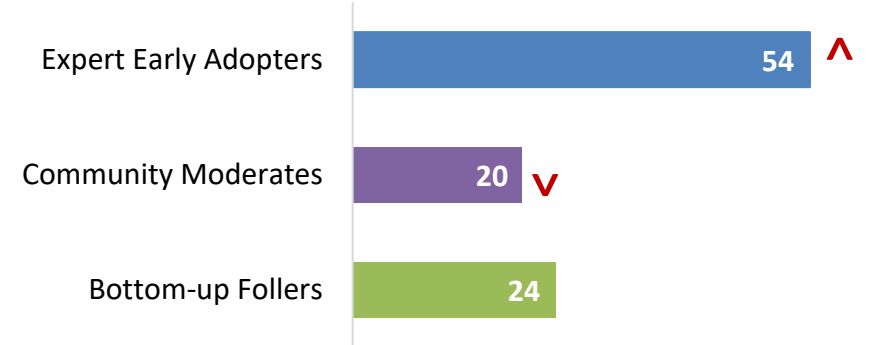


% of severe UC patients by segment

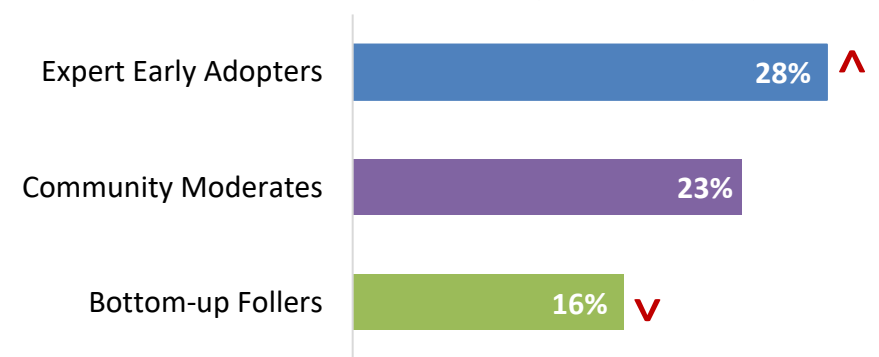


CD patient demographics

Mean # of CD patients seen per month



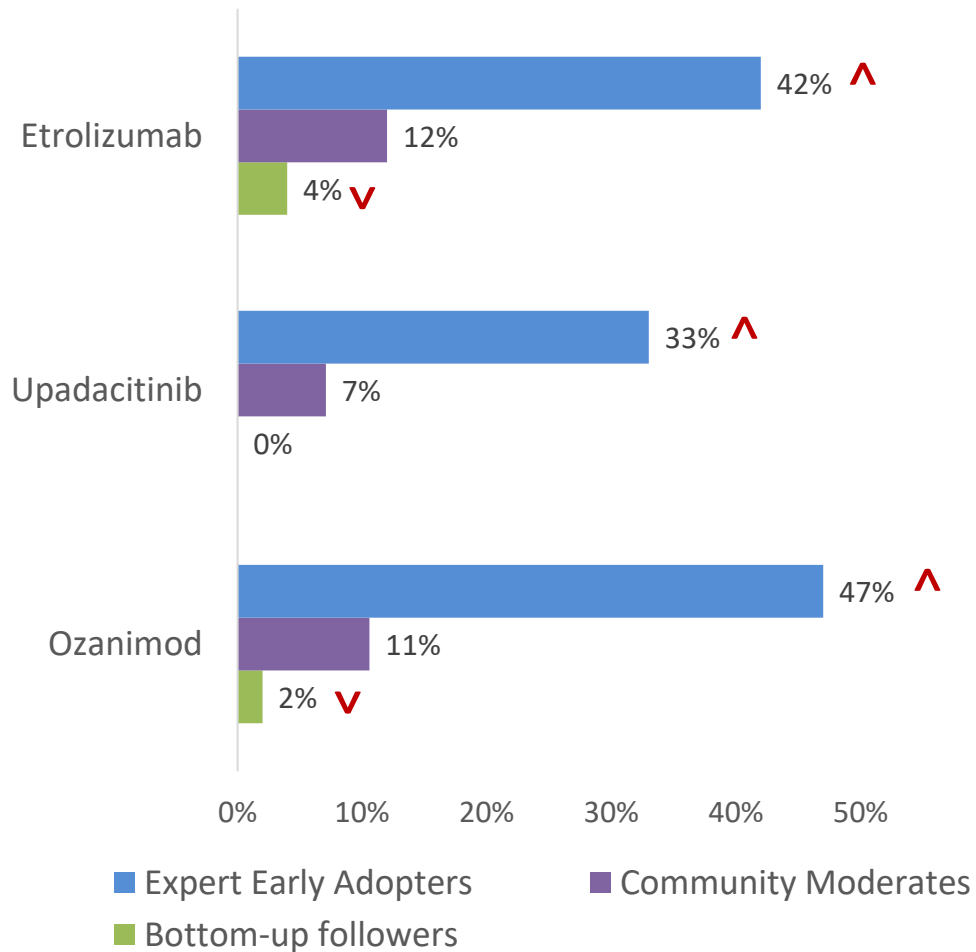
% of severe CD patients by segment



Pipeline familiarity comparison across segments

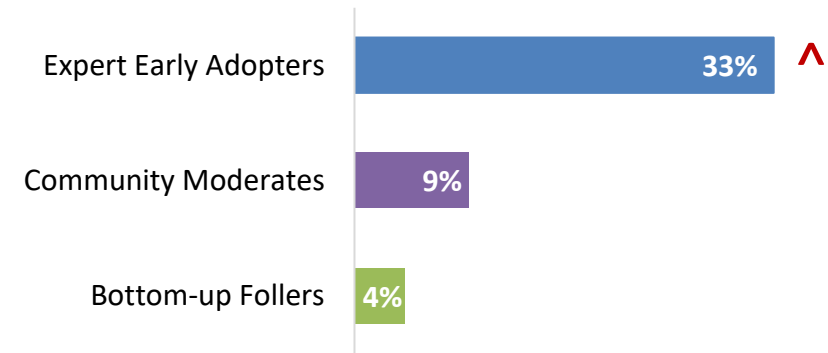
Pipeline familiarity by segment

Familiarity = Very familiar + familiar



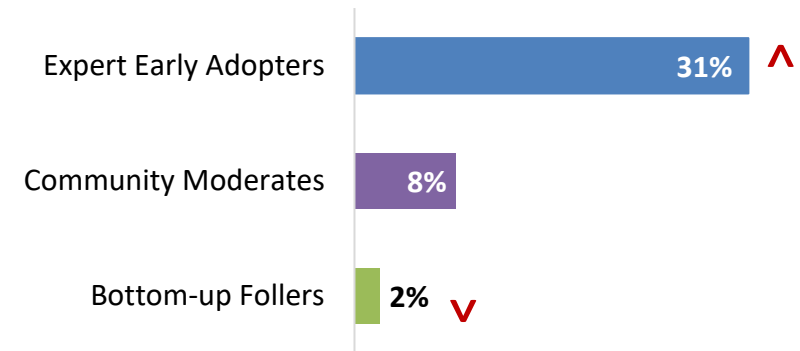
UC trial participation by segment

Participated in a UC trial, in the last year



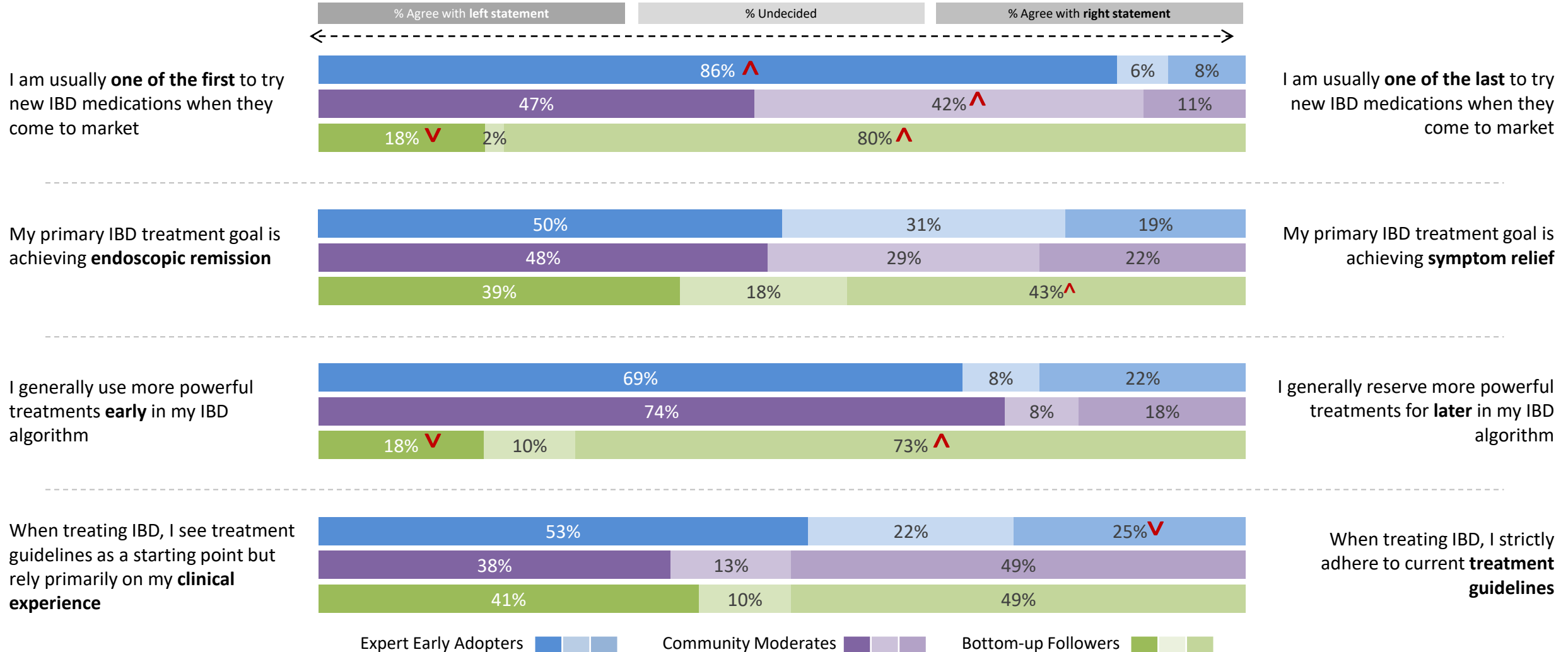
CD trial participation by segment

Participated in a CD trial, in the last year



Treatment approach comparison by segment

Treatment approach by segment



About our partners

This research was funded and conducted in collaboration among Vivisum, Rook Solutions and InfoStream.



Vivisum is a research and brand consultancy with expertise in biotech branding. Our Brand Builder solution provides customized, consultative and comprehensive insights to support biotech brand launches.



Rook Solutions' enhances marketing decision-making with ingenious methodologies that have practical application. We bring our perspective into analytics and develop in-house programs to ensure the best possible approach for the business need.



InfoStream provides physician panel development, database analytics and marketing consultation to its clients.





Thank you for reviewing our segmentation insights.
Please contact us with questions or additional research requests.



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