



## Multiple Sclerosis (US)

### OVERVIEW

The Multiple Sclerosis (MS) market is more dynamic and complex than ever with several disease-modifying therapies (DMTs) currently available and a potential game-changer entry, in the form of Roche/Genentech's Ocrevus (ocrelizumab), approved by the FDA on March 28, 2017. **RealTime Dynamix™: Multiple Sclerosis** allows marketing professionals to keep abreast and react to these market changes and provides critical information that will support their commercial strategies.

The quarterly reports include a detailed and timely look at current trends in the market, key performance metrics, brand gains and losses, key metrics for recently launched products and awareness of products in development. Additionally, an in-depth study of MS patient engagement and its impact in treatment decisions, an analysis of the effectiveness of alternative marketing channels to reach neurologists, and a DMT attribute study are incorporated in specific editions throughout the year.

### SAMPLE & METHODOLOGY

This report is based on an online survey of ~100 practicing neurologists. Respondents are recruited from the Spherix Network, a proprietary group of clinical neurologists in the US. Our collaboration with this network leads to more engaged respondents resulting in higher quality output delivered quickly and frequently.

### KEY QUESTIONS ANSWERED

- Which DMTs will feel the greatest impact of the launch of Ocrevus?
- How are the three oral agents delivering on the key attributes and on typical patient types?
- How are the platform injectables being positioned to optimize first line use and time on drug? To what degree do neurologists have strong preferences for specific brands?
- With fewer opportunities for personal interactions, what are the best channels for industry to share product information with neurologists?
- What are neurologists' attitudes towards Lemtrada and Zinbryta, two high efficacy infusion DMTs?
- How is Glatopa, the first generic DMT, faring in the market? To what extent is use driven by neurologist choice vs. payer mandate?
- How are PML concerns affecting Tysabri, Tecfidera and Gilenya?
- How often are patients requesting specific DMT brands?

### KEY DATES

- Comments and Proprietary Questions Due: 3<sup>rd</sup> week of Feb/May/Aug/Nov
- Reports Publish: Mar/Jun/Sep/Dec
  - *Note: a three day embargo is placed on delivery to non-manufacturers allowing clients time to digest the findings before*

### Products Profiled

#### Commercial Products\*:

Bayer (Betaseron), Biogen (Avonex, Plegridy, Tecfidera, Tysabri, Zinbryta), EMD Serono (Rebif), Sanofi-Genzyme (Aubagio, Lemtrada), Novartis (Gilenya, Extavia), Roche (Rituxan), Sandoz (Glatopa), Teva (Copaxone), Roche/Genentech (Ocrevus)

#### Pipeline Agents:

Active Biotech /Teva (Laquinimod), Novartis (Siponimod, Ofatumumab), Biogen (Anti-LINGO), Receptos/Celgene (Ozanimod), Actelion (Ponesimod)

*\*Brand names are trademarks of their respective companies. Rituxan is not indicated for MS but is frequently used off-label*

### Deliverables

- PowerPoint Deck
- Up to 10 custom analyses
- On-site or webcast presentation of results

### Related Reports 2017

- RealTime Dynamix: Multiple Sclerosis EU
- RealTime Dynamix: Multiple Sclerosis Nurses US
- RealWorld Dynamix: DMT Switching in Multiple Sclerosis US
- RealWorld Dynamix: DMT Switching in Multiple Sclerosis EU
- RealWorld Dynamix: DMT New Starts in Multiple Sclerosis US