



Multiple Sclerosis (US)

OVERVIEW

The US multiple sclerosis (MS) market is more dynamic and complex than ever with several clinically distinct disease-modifying therapies (DMTs) currently available and an active pipeline, including a potential game changer entry in 2017, in the form of Genentech's Ocrevus (ocrelizumab), for primary progressive MS. In addition, building on the first generic DMT launch in 2015, the availability of oral generics over the next few years will result in a major future shift in the landscape in the face of increasing payer pressure.

RealTime Dynamix™: Multiple Sclerosis (US) provides a close-quarters analysis of key performance metrics, focusing on brand gains and losses, industry contact rates, familiarity and adoption rates of recently launched products and awareness of products in development. This ongoing, independent insights series allows marketing professionals to keep abreast of and quickly react to market changes by providing critical information that will support their commercial strategies in the MS space.

SAMPLE & METHODOLOGY

Each quarter, ~100 US neurologists provide their responses to an online survey. Respondents are recruited from the Spherix Network, a proprietary group of clinical neurologists meeting our strict screening criteria. Our relationship with this network leads to more engaged respondents resulting in higher quality output. Additionally, this gives us the opportunity to more easily revisit physicians in order to uncover even more insight on strategically important findings.

KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for the MS market evolving?
- What are the critical opportunities and barriers to growth for each brand and class?
- Which DMTs will feel the greatest impact by 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 industries to share product information with neurologists?
- What are the neurologists' attitudes towards Lemtrada, Tysabri, and Ocrevus, the high efficacy infusion DMTs? Where does Zinbryta fit in with the monoclonal antibodies versus the injectable DMTs?
- How is Glatopa, the first generic DMT, faring in the market? To what extent is use driven by neurologist choice versus payer mandate?
- How are PML concerns affecting Tysabri, Tecfidera, and Gilenya?
- How often are patients requesting specific DMT brands?
- What are the neurologists' perceptions of late-stage pipeline assets and how do they anticipate incorporating these products into their MS treatment?

Products Profiled

Commercial Products

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

Pipeline Agents

AB Science (masitinib), Active Biotech/Teva (laquinimod), Alkermes (ALKS 8700), Biogen (anti-LINGO), Celgene/Receptos (ozanimod), J&J/Actelion (ponesimod), MedDay (MD1003), Novartis (siponimod, ofatumumab)

Key Dates

- Q1 March
- Q2 June
- Q3 September
- Q4 December

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 Table & Summary Statistics
- On-site presentation
- Proprietary questions (for purchasers of the annual series)

Related Reports 2017

- RealTime Dynamix™: Multiple Sclerosis EU
- RealTime Dynamix™: Multiple Sclerosis Advanced Practice Providers US
- RealWorld Dynamix™: DMT Switching in Multiple Sclerosis US
- RealWorld Dynamix™: DMT New Starts in Multiple Sclerosis US

Pricing

- \$29,500 single quarterly wave
- \$89,500 annual series of four reports