



## Multiple Sclerosis (EU)

### OVERVIEW

The EU 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 Roche's Ocrevus (ocrelizumab), for primary progressive MS. In addition, building on the first generic DMT launch in 2016, 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 (EU)** provides a twice-yearly 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

Biannually, ~250 EU neurologists practicing in France, Germany, Italy, Spain, and the UK provide their responses to an online survey. Neurologists meet screening criteria including time in practice, percent of professional time spent in clinical practice (vs. teaching or research), and minimum number of MS patients. Surveys are programmed in the local language.

### KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for the MS market evolving? How does this differ by country?
- 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 generic glatiramer acetate faring in the EU markets where available? To what extent is use driven by neurologist choice versus market access pressure?
- 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 (Betaferon), Biogen (Avonex, Plegridy, Tecfidera, Tysabri, Zinbryta), Merck KGaA (Mavenclad, Rebif), Sanofi (Aubagio, Lemtrada), Novartis (Gilenya, Extavia), Roche (Ocrevus\*, Rituxan), Teva (Copaxone), multiple companies (Synthon's glatiramer acetate\*)

*\*May still be pipeline in certain EU markets at time of fielding*

#### Pipeline Agents

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

### Key Dates

- November 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
- Frequency Table & Summary Statistics
- On-site presentation
- Proprietary questions (for purchasers of the report)

### Related Reports 2017

- RealTime Dynamix™: Multiple Sclerosis US
- 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

- \$49,500