



The Use of Monoclonal Antibody DMTs in Multiple Sclerosis (US)

OVERVIEW

The US multiple sclerosis (MS) market has become fiercely competitive with the introduction of multiple disease-modifying therapies (DMTs) over the past several years with the monoclonal antibody (mAb) class experiencing the greatest expansion with five currently prescribed agents (e.g., Tysabri, Lemtrada, Zinbryta, Ocrevus, and Rituxan). With additional pipeline mAbs on the horizon, it is imperative to understand how these high potency, yet potentially risky, DMTs fit into the treatment algorithm, not only for later line patients, but also as potential competitors for clinically appropriate treatment-naïve patients. Understanding the drivers and barriers behind the choice of specific mAb brands and when a neurologist will start or transition a patient to a mAb is critical to building an effective commercial strategy for both first-line and later-line brands.

RealWorld Dynamix™: The Use of Monoclonal Antibody DMTs in MS (US) blends attitudinal and demographic physician survey data with patient record data to uncover how practice type and setting and certain beliefs influence the treatment pathway and to understand how marketed monoclonal antibody DMTs are being used by physicians and for what patient types. The report also captures physicians' perspectives about monoclonal antibodies in development and the impact they will have on the current MS treatment paradigm.

SAMPLE & METHODOLOGY

Spherix Global Insights conducts an online survey with ~200 US neurologists combined with a large-scale patient record audit of ~600 of their MS patients currently treated with a monoclonal antibody DMT. Each neurologist completes an in-depth retrospective review of their last 2-6 patients who meet specific study criteria. 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

- What are the patient profiles for each of the mAb DMTs? How do the patient profiles for Ocrevus differ from Tysabri? How does the patient profile for Zinbryta, a subcutaneously injected mAb, differ from the infusion mAbs?
- How do second-line or third and later line switches to mAbs differ from first-line starts?
- How does mAb use differ between RRMS, relapsing SPMS, nonrelapsing SPMS, and PPMS?
- What are the key drivers (e.g., efficacy/safety/tolerability/patient/payer) for brand selection among the mAbs? What specific efficacy attributes (e.g., ARR, disability, brain atrophy, MRI measures) drive a mAb choice and how does it differ by brand?
- Are neurologists willing to sacrifice safety for more efficacy in certain populations of MS patients?
- How frequently are neurologists using the JC virus assay and does the result shape the patient pathway?
- How long do neurologists plan to treat patients with a mAb and how does it differ between brands or by patient type?
- What is the opportunity cost for the non-mAb brands (e.g., where would their brand have been selected if the mAb was not available)?
- What will be the impact of pipeline mAbs on the current mAb treatment algorithm and patient profiles?

Products Profiled

Commercial Products

Biogen (Tysabri, Zinbryta), Genzyme (Lemtrada), Genentech (Ocrevus, Rituxan)

Pipeline Agents

Biogen (opicinumab), Novartis (ofatumumab), Servier/GeNeuro (GNbAC1), TG Therapeutics (ublituximab)

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
- Copy of de-identified database
- Proprietary questions (for purchasers of the report)

Related Reports 2017

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

Pricing

- \$79,500