



## 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, including Genentech's Ocrevus for primary progressive MS (PPMS) and generic glatiramer acetate agents. An active late-stage DMT pipeline holds the promise of a H1 2019 launch of EMD Serono's Mavenclad for RMS and Q1 2019 launch of Novartis' Mayzent with a first-to-market secondary progressive MS (SPMS) label. Evolving practice guidelines recommend early treatment with high efficacy DMTs in highly active MS patients although neurologists' beliefs and prescribing patterns do not appear to always be in sync.

**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. Product perceptions, disease awareness and attitudes, practice management and other topics are rotated throughout the year to provide an ongoing probe of the crucial drivers of change. 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?
- How will the potential launches of Mayzent and Mavenclad impact the SPMS and RMS markets, respectively? To what degree will the availability of Mayzent expand the SPMS segment or increase the switch rate during SPMS transition? What treatment patterns will differ between active versus not active SPMS patients?
- With continued market penetration, where are neurologists using Ocrevus in the RMS treatment algorithm?
- How is the availability of multiple generic glatiramer acetate agents impacting the market? To what extent is use driven by neurologist choice versus payer mandate?
- How is the treatment algorithm changing with expanding oral DMT options and increasing experience?
- To what degree do neurologists have strong preferences for specific brands within the DMT classes? How are the DMTs delivering on the key attributes and on typical patient types?
- With fewer opportunities for personal interactions, what the best channels for industry to share product information with neurologists?
- How often are patients requesting specific DMT brands?
- What are 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), EMD Serono (Rebif), Genentech (Ocrevus, Rituxan), Genzyme (Aubagio, Lemtrada), Mylan (generic glatiramer acetate), Novartis (Gilenya, Extavia), Sandoz (Glatopa), Teva (Copaxone)

#### Pipeline Agents

AB Science (masitinib), Biogen [opicinumab, diroximel fumarate\* (with Alkermes)], Celgene (ozanimod), EMD Serono (Mavenclad\*), J&J/ Actelion (ponesimod), MedDay (MD-1003), MediciNova (ibudilast), Novartis (Mayzent\*, ofatumumab), TG Therapeutics (ublituximab)

\*Could move to commercial products based upon regulatory outcomes

### 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

- RealTime Dynamix™: Multiple Sclerosis EU
- RealWorld Dynamix™: DMT New Starts in Multiple Sclerosis US
- RealWorld Dynamix™: DMT Switching in Multiple Sclerosis US
- RealWorld Dynamix™: Progressive Forms of Multiple Sclerosis US
- RealWorld Dynamix™: DMT Switching in Multiple Sclerosis EU