

AnswersOn

Multiple Sclerosis




Multiple Sclerosis (MS) is a persistent disease of the central nervous system (**CNS**) that can affect the brain, spinal cord, and optic nerves in the eyes.*

MS is thought to be an **immune-mediated disorder** in which the immune system incorrectly attacks healthy tissue in the CNS. MS patients may experience symptoms such as slurred speech, fatigue, loss of balance/coordination, tremors, numbness, problems with memory and concentration, paralysis and problems with vision and/or blindness. These symptoms may affect patients differently, as patients may experience them persistently or periodically in episodes.

TreatmentAnswers Data


In MAT ending June 2023, **HCPs reported the following** regarding the MS patient population:



18 to 49


Majority are between the ages of 18 and 49

56.4% of newly diagnosed visits are in the 30 to 49 age groups.



Multiple sclerosis is typically treated alone

90.9% of office visits confirm there are no comorbid conditions.



Physicians almost always prescribe a drug

93.6% of the 4.3M visits were prescribed a drug to treat Multiple Sclerosis (ICD-10 G35)

Source: AnswerSuite TreatmentAnswers

PromotionalAnswers Data

During the 12 months ending June 2023...

Spent approximately

\$268million

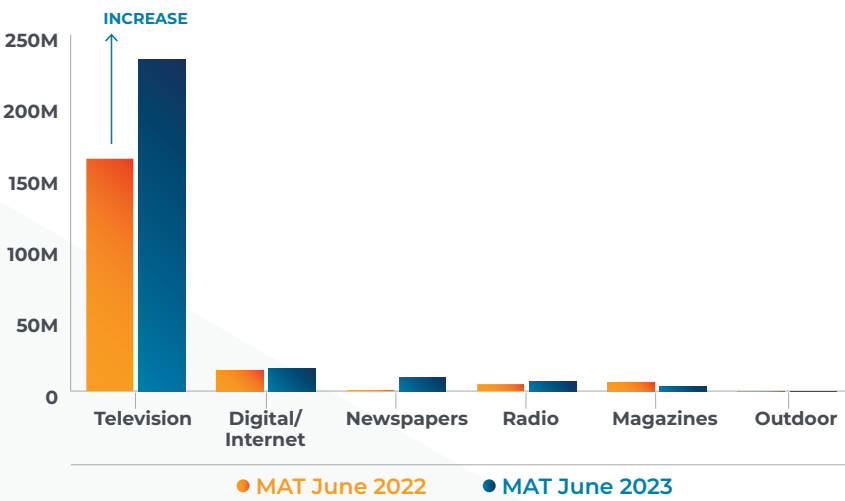
on MS direct-to-consumer promotion.

Over

40%

of MS market DTC spend was contributed by Genentech and theOcrevus brand.

Direct-to-Consumer (MAT June 2022 vs MAT June 2023)



Source: AnswerSuite, ConsumerAnswers, Kantar Media

*According to the National Multiple Sclerosis Society.

Note: MS diagnosis was defined as ICD-10 G35. The MS drug market was defined as USC 20910, 86211 and 86231.
Source: AnswerSuite ConsumerAnswers/Kantar Media

Reach out to one of our **AnswerSuite experts** for a complimentary report

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- ▶ **AnswerSuite a Syneos Health Company** provides a Proprietary syndicated Market Research Solution that utilizes a panel of thousands of healthcare providers over a 30-year period. AnswerSuite is consumed by the Biopharmaceutical industry with insights delivered through a SaaS platform or with full service from analysts.
- **TreatmentAnswers** captures and reports on patient visit interactions with HCPs. These insights include patient and HCP demographics, diagnoses, comorbidities and intended drug therapy.
- **PromotionalAnswers** tracks and monetizes promotional activities such as detailing, events, virtual engagements, and sampling. Through partnerships, professional journals and DTC advertising are also tracked.
- **Custom Insights** supports different use cases through a unique proprietary survey. Custom Insights answer a multitude of questions such as: What is the HCPs awareness of your brand and competitors? What is the message recall of your brand and competitor? What is the share of voice among HCP targets and non-targets? The quick studies supplement why the actions are being taken and inform multiple business strategies.