

MARKET REPORT



Digital Landscape: Multiple
Sclerosis

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Digital Landscape: Multiple Sclerosis

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Summary

The Digital Landscape Multiple Sclerosis report analyzes digital activities undertaken by Pharma in support of disease-modifying therapies for Multiple Sclerosis (MS).

Key Highlights

- US Patients: Overall, digital pharma support is strong for MS patients in the US; good quality branded and unbranded resources detected, particularly from Biogen, Teva and Sanofi Genzyme. Patients are well supported by social media, with branded Facebook pages from Teva, Novartis and EMD Serono the most successful. Less mobile app activity seen, with top offerings from branded treatment trackers, with Bayer's new app achieving early success.
- US HCPs: There is little support for HCPs in the MS space beyond branded, with Genzyme, Biogen, and Teva offering the best branded resources. The pharma-sponsored unbranded and mobile app landscapes are sparse, and opportunities may exist to develop or sponsor content with trusted non-pharma organizations. HCP-directed social media activity restricted to posts from corporate accounts, with examples of HCP-specific accounts seen in other diseases.
- EUCAN Patients: MS patients in EUCAN are well supported by pharma overall, particularly those in Germany. Support is weakest in the UK and Canada. Best branded support seen from Sanofi Genzyme, Teva and Merck KGaA, with most brand activity related to patient support programs. Pharma provides strong unbranded support but no multi-country, local-language campaigns, with the majority of sites supported by social media. Pharma-sponsored mobile app landscape is strong, particularly from Novartis, with common features including disease tracking and reminders.
- EUCAN HCPs: Limited HCP support provided by pharma in MS beyond brand sites. Merck KGaA and Sanofi Genzyme offer the best branded support, with a number of sites detected across EUCAN. The unbranded and mobile app landscapes are undeveloped, and like the US, partnerships with non-pharma organizations may offer more effective opportunities to engage with and support HCPs.

Scope

- This report analyzes digital activities undertaken by Pharma in support of disease-modifying therapies for MS.
- The report includes digital activities directed towards patients and/or HCPs, including branded websites, unbranded disease awareness initiatives, social media and mobile apps.
- The report is based on analysis conducted by a combination of GlobalData's digital and disease-specific teams. It also includes analysis of data licensed from third parties e.g. website traffic, search engine optimization (SEO), digital display advertising, mobile app downloads, and social media interaction.
- The geographic scope of the report is the United States, Canada and the 5EU (UK, Germany, France, Italy & Spain), with EUCAN used as an abbreviation for Europe and Canada throughout.
- This report covers the research period from January - December 2017.

Reasons to buy

- Our Digital Landscape report provides an analysis of Pharma multichannel activity in the digital MS space, and can assist our Pharma clients derive value in a number of ways:
- Competitive Intelligence: Track and compare key competitor activity across channels and identify key trends in MS
- Digital Strategy: Strengthen corporate digital excellence, learn from industry best practice, and identify opportunities for novel digital campaigns
- Support new brand launch: See best practice examples of pre- and post-launch digital activities, ascertain must-have digital assets for patient and HCP engagement, and assess potential gaps and opportunities for pipeline brands
- Business Development & Licensing: Assess topics and trends shaping digital health in MS and beyond, and learn about key patient and physician online activities in MS.

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