

Diabetes in the UK

Social Media Intelligence Healthcare Report



pharmaSocial intelligence
International

Monitoring & Analysing Online Commentary Manually,
Delivering Intelligence to our Healthcare Clients

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1.0 Executive Summary

This report looked at some of the social media commentary emerging in the UK market concerning the diabetes therapeutic area, was conducted between October to December 2013 and used primary search terms to identify patient and healthcare commentary on diabetes. A total of 1,510 relevant results formed the base for the analysis. Various aspects of social media commentary were evaluated, such as company image, drug mentions, healthcare professionals, patients and key influencers.

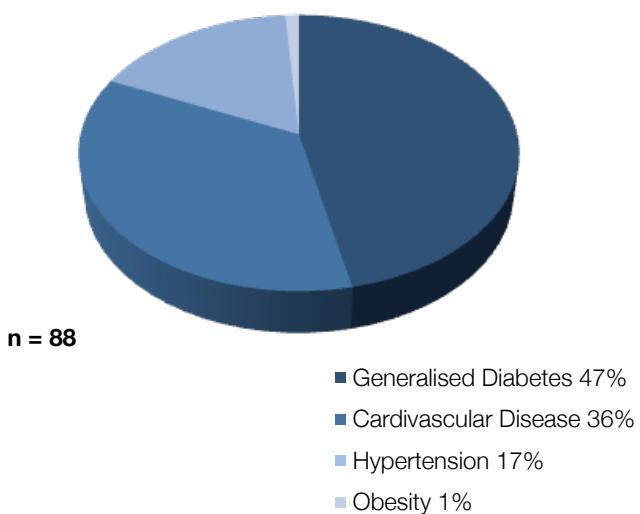
The analysis revealed that in the UK:

- Discussions concerning company image were numerous and generally positive, although a new story concerning a malfunctioning Medtronic insulin pump attracted some negative coverage.
- A high level of brand mentions was apparent, with these being mostly in relation to general diabetes and its link to obesity.
- Clinical trials and research developments dominated discussions involving healthcare professionals.
- Patient use of social media was high, with discussions mainly centred on their disease journey, diagnosis and a general dissatisfaction with current healthcare offerings.

2.0 Company Image

UK company image discussions were a highly visible element within social media discussions and information was often exchanged without a high degree of sentiment being expressed. Twitter hosted the highest volume of company image discussions in the UK, but mentions on healthcare sites and also financial websites were common. These discussions were most frequently against the backdrop of generalised diabetes conversations and sometimes in the context of obesity and cardiovascular disease.

Commentary identified by disease area



The conversations were often highly specific and drew upon industry developments in other areas of the world, such as the US market. This was particularly noticeable with respect to Merck's

launch of an evidence-based weight management programme in the US, which accounted for nearly a third of UK commentary in this area. The news featured a high degree of sharing, with 92% of this commentary exchanged on Twitter, most commonly by individuals with an interest in dietary matters and healthy living. The commentary appeared positive in nature.

There was also considerable mention of an announcement by Novo Nordisk of two separate regulatory submissions for a 3 mg dose of Victoza, a once-daily human GLP-1 analogue, as an adjunct to a reduced-calorie diet and increased exercise. Typically, medical journalists and healthcare professionals were those who shared this type of company news.

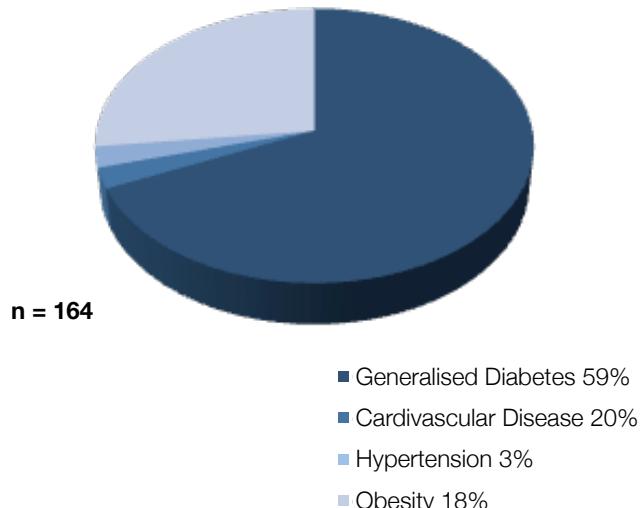
Wider industry developments were also of interest. There was noted social media interest in AstraZeneca (AZ) plans to acquire Bristol-Myers Squibb's (BMS) share of global diabetes alliance assets. Similarly, users of social media were quick to share details of company collaborations within the diabetes field. For example, particular attention was drawn to news that BMS and AZ received positive recommendations from the All Wales Medicines Strategy Group (AWMSG) for their diabetes drug Onglyza, enabling it to be used in the treatment of NHS Wales patients.

While much of the information shared regarding company activities was neutral in nature, some negativity did emerge concerning certain developments. In particular, a story concerning the unfortunate death of a young British woman due to a malfunctioning insulin pump manufactured by Medtronic led to a flurry of emotive discussions after the story appeared in the mainstream media. This clearly showed how important it was to understand social media in the UK and its capacity to propagate negative as well as positive news concerning the pharmaceutical industry.

3.0 Drug Mentions

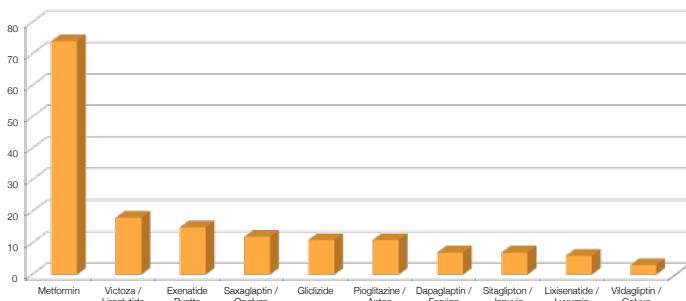
Drug mentions were a common feature of social media discussions, particularly given the frequent sharing of press releases and other industry news on sites such as Twitter. There was a high level of brand mentions, with these being mostly in relation to general diabetes and its link to obesity.

Commentary identified by disease area



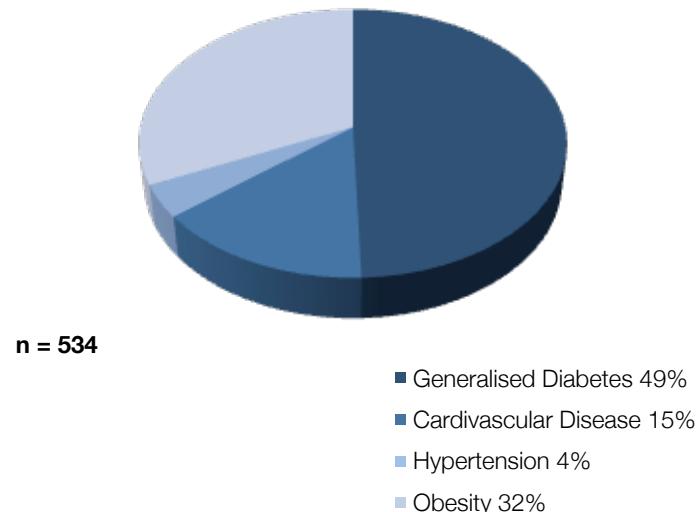
Metformin clearly dominated UK drug mentions with 45% of overall commentary, but more recent products such as Victoza (11% share of voice) and Byetta (9% share of voice) also made their mark. Metformin was most frequently discussed in relation to weight loss and this was evident by the high degree of information exchange regarding a US study in obese children without Type II diabetes who had been given Metformin. The study, published in JAMA Paediatrics, suggested that weight loss with metformin in this group was modest and comparable to children who only made a change in their lifestyle.

Drug mentions in social media commentary

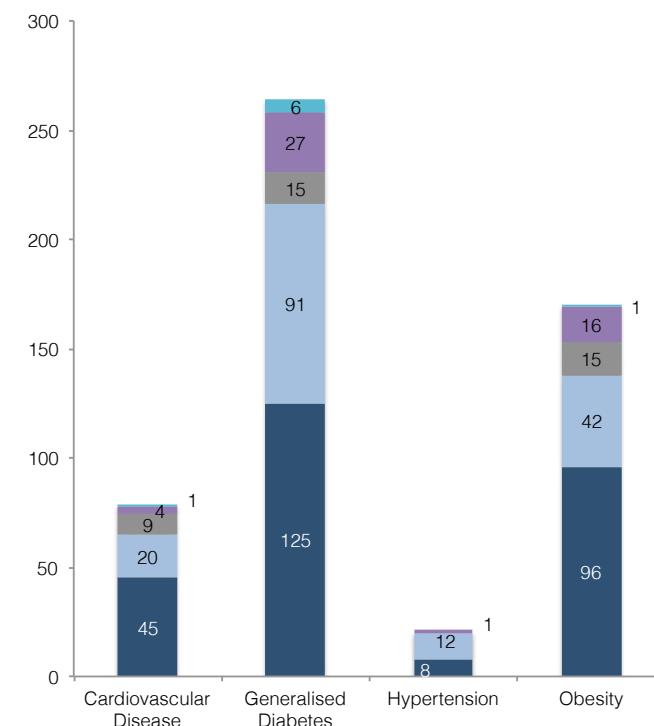


Over one-third of healthcare professionals' discussions were in relation to obesity and these exchanges were dominated by dieticians and healthcare professionals.

Commentary identified by disease area

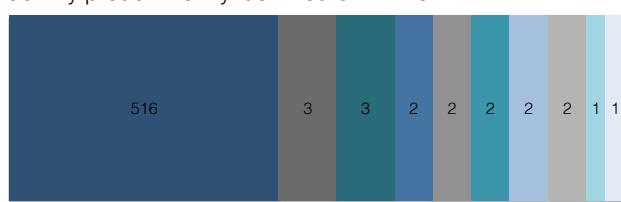


HCP discussions by disease area



4.0 Healthcare Provider Commentary

Nearly a third of UK social media commentators could be identified as healthcare professionals, with healthcare industry social media activity predominantly identified on Twitter.



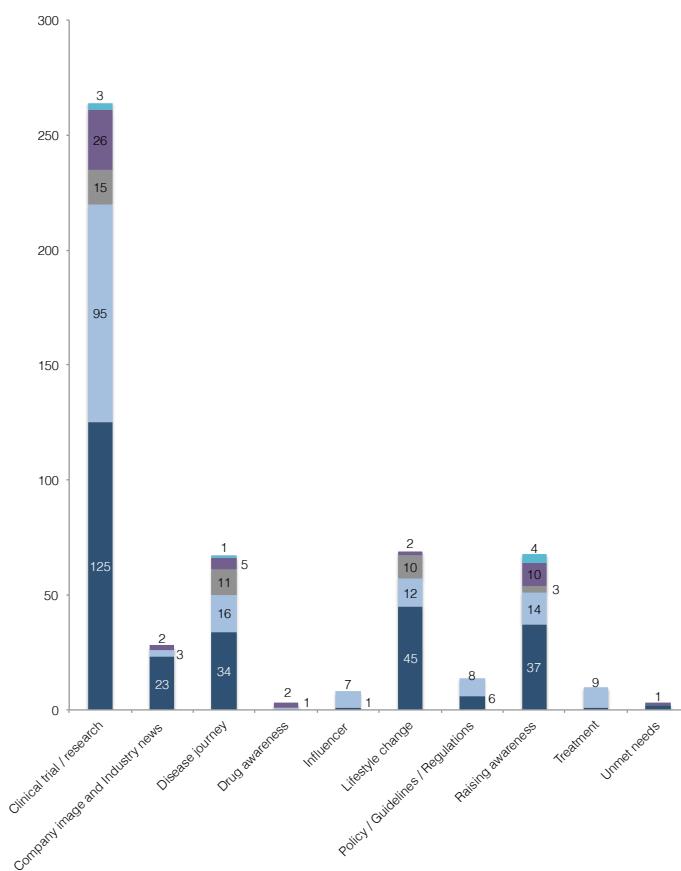
- twitter.com
- www.second-opinion.co.uk
- youtube.com
- www.thestudentroom.co.uk
- theblixreport.com
- digitalspy.co.uk
- www.prescriber.org.uk
- www.netmums.com
- womens-health.com
- diabetes-support.org.uk

n = 534

- Twitter - health account
- Medical Journalist
- Lifestyle Advisor
- Healthcare Professional
- Dietician

There was a profound interest in clinical trials and research developments and these dominated discussions involving healthcare professionals. The outcomes of these trials and recommendations to improve on lifestyle and diet rather than pharmacological intervention were of particular interest. It was notable that the social media commentators were clearly monitoring global developments when reporting new findings.

HCP Discussions



n = 534

- Twitter - health account
- Medical Journalist
- Lifestyle Advisor
- Healthcare Professional
- Dietician

A Newcastle University study, funded by Diabetes UK, which suggested that Type 2 diabetes could be reversed by following a daily 800-calorie diet for eight weeks featured in 13% of discussions. Similarly, a US study that generated great interest showed that sustaining a modest weight loss for 2 years in overweight or obese, middle-aged women may reduce risk factors for heart disease and diabetes. Another cited study, by Edinburgh University, was the first to focus on South Asian cultures in the UK. It found that through modest lifestyle changes in diet and activity by South Asian families could improve their chance of losing weight to lower their risk of type 2 diabetes. Finally, a Spanish study that suggested that a Mediterranean diet alone may lower diabetes risk was also the subject of much discussion.

The voice of dieticians was also prominent in social media, with this group being most active in raising awareness of the link between obesity and diabetes. Both dieticians and healthcare professionals shared information on the 'Action on Sugar' campaign, which aims to reduce the amount of sugar added to food and soft drinks in an effort to tackle obesity and diabetes in the UK. Dieticians were noticeably keen to educate colleagues about the link between obesity, heart disease and diabetes - suggesting that at medical schools in the UK only 10 hours was being spent on nutrition.

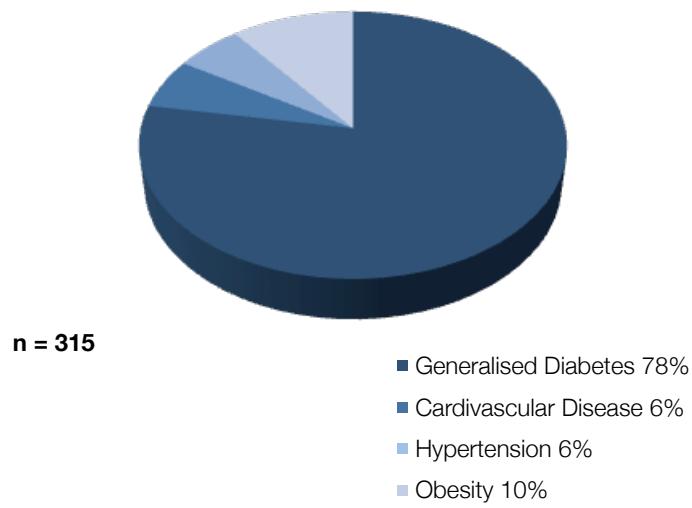
Overall, risk factors and prevention strategies were discussed by healthcare professionals, dieticians, accounting for 75% of the disease journey discussions. Generally, changes to diet and lifestyle were most frequently recommended by dieticians and lifestyle advisors and much less so by healthcare professionals.

5.0 Patient Commentary

Patients were highly active in the social media arena, accounting for 30% of discussions related to this area of health. Although patients dominated the conversations, non-healthcare commentary also included bloggers, friends, relatives, forum posters and carers.

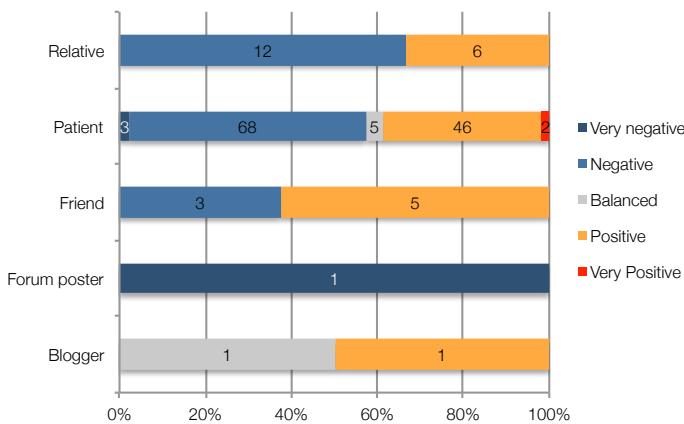
Unlike healthcare commentary, patient conversation participation was more likely to take place on diabetes focused forums or other healthcare sites. The diabetes.co.uk website, which describes its audience as 91,401 people with diabetes, their carers and family, was unsurprisingly a prominent point for such exchanges but Twitter also featured highly. Generalised diabetes, separate from discussions concerning cardiovascular disease, hypertension and obesity, were most frequently discussed.

Commentary identified by disease area



Patient and the other commentators most frequently discussed their disease journey, from risk factors and prevention strategies through to diagnosis discussions. The supportive nature of these exchanges was evident.

Sentiment demonstrated in disease journey discussions



n = 312

In particular, diagnosis of diabetes was a frequent conversation prompt in social media commentary, with many diabetes patients expressing shock at the news. The forums served as an inviting environment as patients were able to discuss their own personal experiences as well as providing recommendations to others. From the social media exchanges, it was clear that diabetes patients were very frustrated with their diabetes because of the way in which it was impacting their quality of life. Care on the NHS was also another topic of conversation, with many patients relating stories concerning inadequate care and poor advice.

There was some mention of treatments, but specific drug comparisons did not seem to be part of the conversations. Patients occasionally spoke directly about a diabetes brand, but clinical trial discussions and news stories in relation to pharmaceutical companies were minimal. Nevertheless, patients sought advice on treatment efficacy and also discussed side effects of their diabetic regimes, such as sickness and gastrointestinal problems with metformin. Insulin pumps were not well perceived in patient commentary, with them being described as tiring, weight inducing, inefficient, and often requiring modifications.

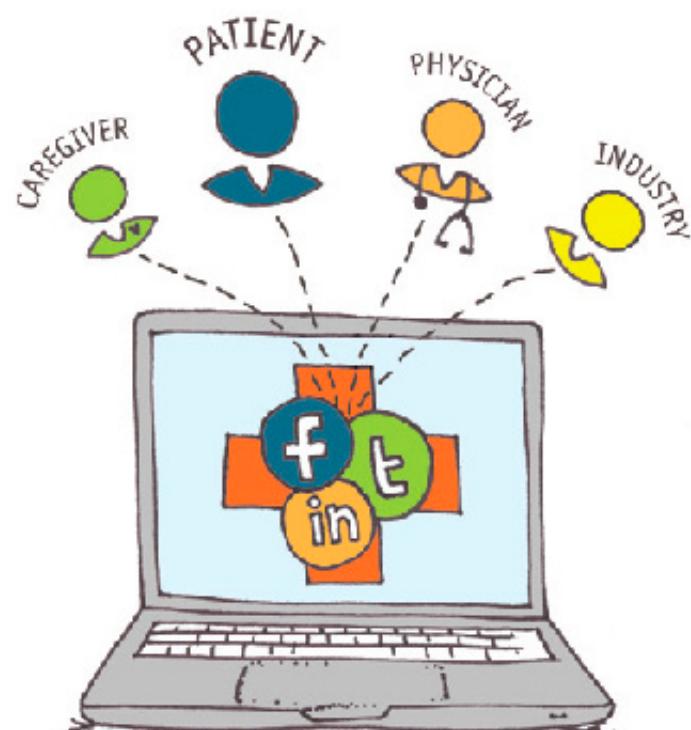
Overall, although the forums provided a sense of community for patients with diabetes as well as their families and supporters, there was a noticeable level of dissatisfaction with the current state of healthcare available. It would suggest that news about developments that can improve the quality of life for patients would be favourably received by this online community.

6.0 Conclusions

This limited picture of the UK social media environment reveals it to be a highly active field involving numerous stakeholders. Company activities featured surprisingly prominently in online discussions, with frequent sharing of information on new drugs as well as commercial deals that might influence the development of future products. Not surprisingly this was accompanied by a high level of drug mentions with specific information on brands being exchanged in relation to general diabetes and its link to obesity. The crowded nature of the diabetes therapeutic areas suggests that regular monitoring of social media would be of value to determine how newer entrants feature in stakeholder discussions.

It is clear that the UK healthcare professional online community is highly sophisticated, with many keeping up to date with the latest developments in global clinical trials and studies and rapidly exchanging such information with their peers. Dieticians are a visible subgroup and are strongly emphasising the need to raise awareness of the link between obesity and diabetes. Further evaluations of these discussions would be of interest to determine the impact information exchange between healthcare professionals has on practice.

Patients are another highly active group and while they do discuss treatments and product-specific information, their overwhelming interest appears to be the negative impact that diabetes is having on their lives. There is clearly a great degree of dissatisfaction with the healthcare they are receiving, the advice they are being given and the general support they are offered to cope with their condition. Fortunately, many have found social media to be a positive environment where they can receive a sympathetic response when relating personal experiences, share information and lobby for change. Regular analysis of social media may be helpful in determining how to fulfil some of the unmet needs facing the diabetes community.



7.0 Digital listening for your brand or company

- Investigate your company / brand specific mentions in more detail with regards to corporate reputation and positive / negative sentiments on individual drugs.
- Targeted analysis to identify specific healthcare provider, media and patient influencers relevant to your brands and indications.
- Explore in more depth how specific initiatives / focal points being mentioned could impact activities by your company or represent opportunities, such as:
 - Merck's launch of an evidence-based weight management programme in the US
 - The two separate regulatory submissions by Novo Nordisk for a 3 mg dose of Victoza
 - A story concerning the unfortunate death of a young British woman due to a malfunctioning insulin pump manufactured by Medtronic
 - The US study in obese children without Type II diabetes who had been given Metformin, published in JAMA Paediatrics
 - Quoted studies focussing on lifestyle changes to prevent or manage diabetes
 - Patient dissatisfaction with support at the point of diagnosis and ongoing management of diabetes beyond the pill



Appendix

About pharmaSocial Intelligence International

Dr. Mo Sacoor MBChB MRCP, The Founder and Chairman of Medical Market Research International (MMRI) and Janet Gunner have launched a digital listening market research company, pharmaSocial intelligence International (pSi).

This combination of over 30 years' experience in the medical market research field with a fresh innovative approach to research is the perfect combination to provide a unique, high quality research methodology to the healthcare industry. pSi will support MMRI's traditional market research services.



Monitor

The technology will search for healthcare conversations globally, in multiple languages.

The system will find commentary by key words and phrases, combined with sophisticated filtering to identify relevant conversations.

Online conversations will be comprised of discussions from healthcare forums, patient groups, blogs and the traditional well known websites.

This automated data is ready to be analysed by the healthcare team for relevancy, sentiment and meaning.



Analyse

A healthcare trained analyst will manually review each social media post in-depth. This approach enables our analysts to include multiple pieces of information from one conversation.

This qualitative approach to analysis will look to answer key questions on a disease area, brand, company or to identify influencers.



Report

A medical report writer will review the aggregated data and prepare the report.

Our clients have the option to purchase market research reports by country or commission bespoke market research.

The industry report will be segmented into key areas, providing insights on:

- Emerging issues
- Risk and reputation
- Company image
- Healthcare professionals
- Patients
- Influencers

PharmaSocial Intelligence International is a member of:



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