

Diabetes in Germany

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 German market concerning the diabetes therapeutic area, was conducted between October to December 2013 and used primary search terms in German to identify patient and healthcare commentary on diabetes. A total of 567 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 Germany:

- Discussions concerning company image were rare.
- A substantial proportion of drug mentions were patient-led.
- Healthcare professional commentary focused primarily on generalised diabetes and obesity but also covered ongoing clinical studies.
- Patient discussions focused on general support and disease prevention commentary, but also highlighted a dissatisfaction with access to treatments.

2.0 Company Image

There were very few company image discussions in Germany, and all those identified focused on generalised diabetes. Submissions for FDA approvals prompted mentions of AstraZeneca, Bristol-Myers Squibb, Eli Lilly, Johnson & Johnson, Boehringer Ingelheim and Astellas. There was also some interest regarding developments elsewhere in Europe.

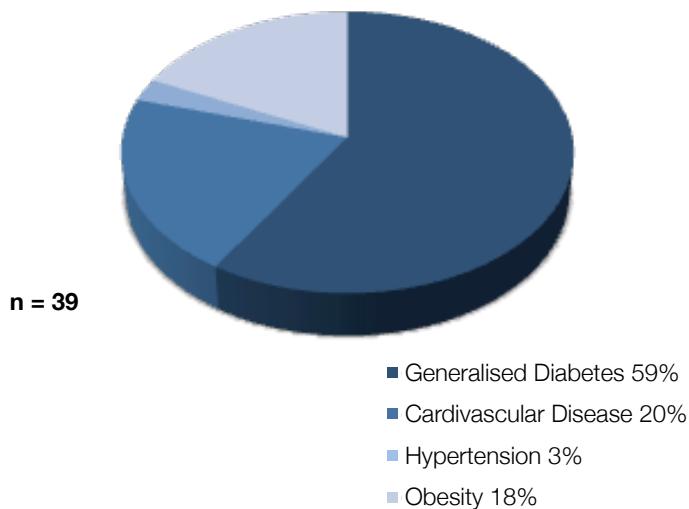
While the pharmaceutical industry's image was a rare subject of social media discussion, it is of note that the commentary identified referred to global activity of companies. It would suggest that social media commentators may take account of developments in other markets in the future.



3.0 Drug Mentions

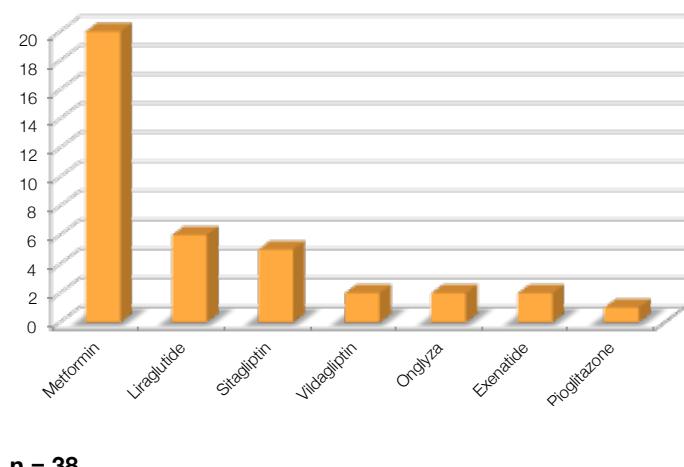
Just over 40% of German drug mentions were patient-led. Of these mentions, generalised diabetes was the main driver (59%) of German drug mentions followed by cardiovascular disease (20%) and obesity (18%). It was apparent that commentators were quite aware of the array of products on the market as seven different drugs were mentioned. Metformin accounted for around half of the discussions, but there were also references to liraglutide, sitagliptin, vildagliptin, saxagliptin, exenatide and pioglitazone.

Commentary identified by disease area



Interestingly, within the specific drug commentaries there was substantial reference to side effects and the impact on daily life for patients. Discussions relating to side effects comprised 30% of mentions for metformin and 33% for Victoza. Side effects typically mentioned for both these drugs were nausea, loss of appetite and diarrhoea.

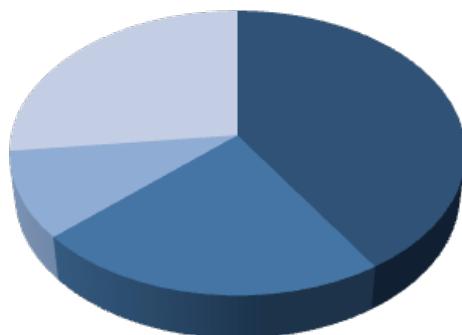
German mentions by specified drugs



4.0 Healthcare Provider Commentary

Nearly 10% of German social media commentators could be identified as healthcare professionals. The top domains for their commentary were medical and science news sites although news sites often featured researcher commentary. Medics were frequent users of Twitter and Diabsite to share information regarding disease risk factors and research news.

Commentary identified by disease area



n = 71

- Generalised Diabetes 41%
- Cardivascular Disease 22%
- Hypertension 10%
- Obesity 27%

Overall, this type of professional commentary was dominated by the themes of generalised diabetes and obesity. Obesity was often mentioned as being commonly linked to metabolic syndrome and diabetes.

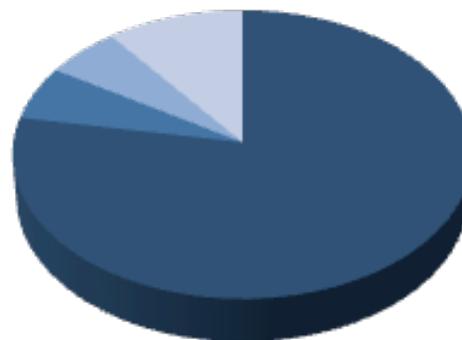
In the social media discussions there was noticeable interest from both medical journalists and healthcare professionals in clinical trials and research towards newer treatments. Both sets of parties were keen to share their views on identified studies. The most frequent citation was a review of a scientific study suggesting meat and dairy products do not increase the risk of diabetes. Another popular discussion centred on research from the Intermountain Medical Centre Heart Institute and John Hopkins University suggesting that measuring the body mass index of Type II diabetics would enable a prediction of the risk of CVD with greater precision.

The discussions identified revealed a strong interest in not only dealing with the disease impact at present but also trying to shed some light on what the future diabetes landscape might look like. In this respect, it was evident that social media commentators were not restricting themselves to Germany and were taking note of developments in foreign countries.

5.0 Patient Commentary

The area of patient commentary was found to be particularly vibrant, with it being overwhelmingly clear that patients and their relatives found this environment to be mutually supportive. Support group comments included both general support and disease prevention commentary. The topic of the disease journey dominated the commentary, but lifestyle changes featured in 16% of conversations, with particular emphasis on improved dietary changes.

Commentary identified by disease area

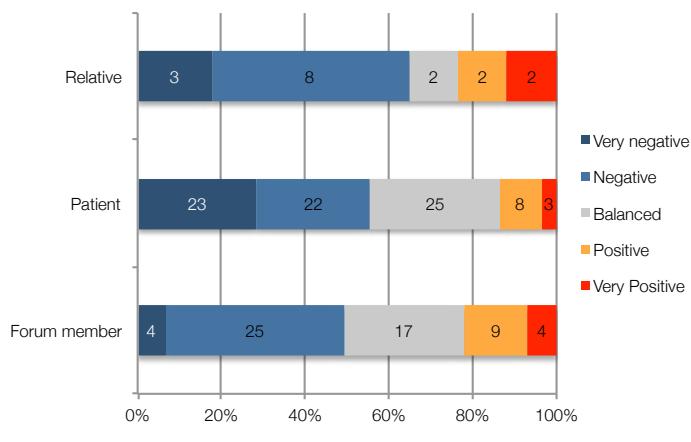


- Generalised Diabetes 78%
- Cardivascular Disease 6%
- Hypertension 6%
- Obesity 10%

The importance of relatives to patient discussions was apparent as over half of supportive conversations included commentary from these individuals, with a Facebook share often from a concerned relative. One interesting figure that emerged from the analysis was that 92% of relatives' conversations were supportive.

Overall, the commentary revealed clear patient concern regarding risk factors and featured much discussion on the link between diabetes, diet and lack of exercise. Not surprisingly, changing one's diet accounted for over 90% of lifestyle change conversations. Consequently, there were several exchanges regarding dietary recommendations for improving blood glucose levels and dealing with generalised diabetes concerns. Generally, disease risk factors and prevention were spoken about in a balanced manner.

Sentiment demonstrated in disease journey discussions



6.0 Conclusions

This initial analysis shows that German stakeholders with an interest in diabetes have clearly identified social media as a means to communicate views and share experiences. At present, discussion concerning the pharmaceutical industry forms a very limited part of the commentary. Nevertheless, company activity in the development of new drugs is of general interest, with this even covering product approvals in the US. It would be interesting to determine whether more German-specific industry developments feature in future social media discussions.

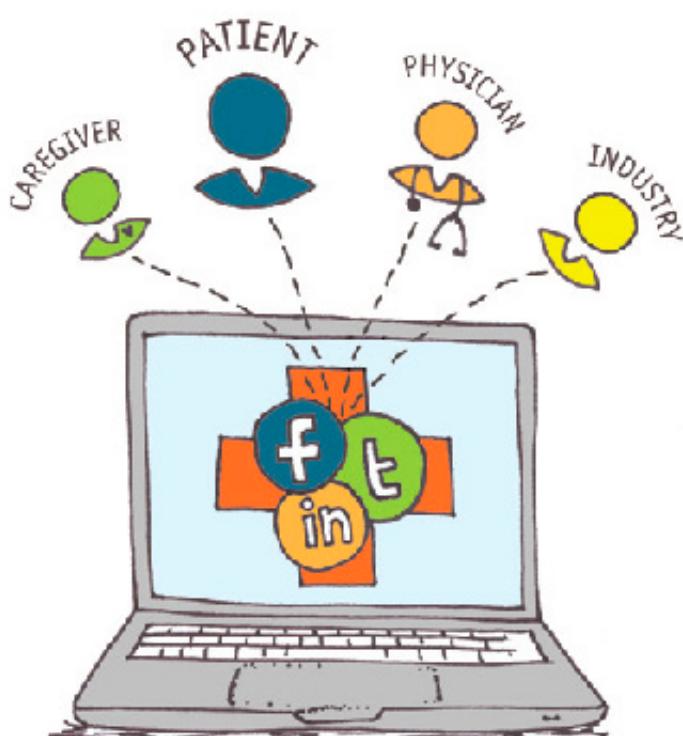
Healthcare professionals appear most concerned about disease risk factors and the impact of the disease. A more proactive approach to tackling diabetes is of interest to them and so it is not surprising that they have shown interest in PREVIEW, the large multi-national diabetes prevention study. An interesting angle to explore in future analyses will be discussion around the reported outcomes for the PREVIEW study. The project was set to run for 5 years starting in January 2013 and so results should be expected to emerge in the media.

Patients value the opportunity to share their experiences with each other. Supportive and experiential conversations garnered the most positive sentiment among this group. Furthermore, relatives are highly active in social media and their support appears highly valued by patients.

Like healthcare professionals, there is a great patient interest in risk factors and dietary approaches to improve their health. From the discussions identified, there is a sense that German patients are somewhat dissatisfied by the current options for the healthcare. Although there was some mention of specific treatments and drugs, there was also reference to topics such as healthcare insurance and access to treatment. This may indicate continuing unmet need in Germany and would be an aspect of interest to examine in future analyses.

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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