

Diabetes in France

Social Media Intelligence Healthcare Report



pharma**Social** 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 French market concerning the diabetes therapeutic area, was conducted between October to December 2013 and used primary search terms in French to identify patient and healthcare commentary on diabetes. A total of 668 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 France:

- Discussions concerning company image were infrequent, but there was a growing interest in the pharmaceutical industry's activities.
- Metformin dominated the drug conversations and patients were keen to share clinical experiences.
- Healthcare providers were concerned at the future impact of diabetes and wanted patients to take a more active role in their health.
- Patients have found social media to be a supportive environment for the sharing of experiences as well as a mechanism to learn about new drugs and treatment options.

Other aspects of the pharmaceutical industry's activities including developments in insulin and patent approvals were also identifiable. Two companies that benefitted specifically in this regard were Novo Nordisk and Takeda. Novo Nordisk's patent application for its GLP-1 Agonist and Orexigen Therapeutics' partnership with Takeda were themes for discussions. Other company-specific mentions formed part of the generalised diabetes conversations, such as production advances for Eli Lilly's high speed filling line of insulin cartridges at its Fegersheim factory in the Alsace region. Similarly, there was interest in Johnson Electrics miniature engine for insulin pumps.

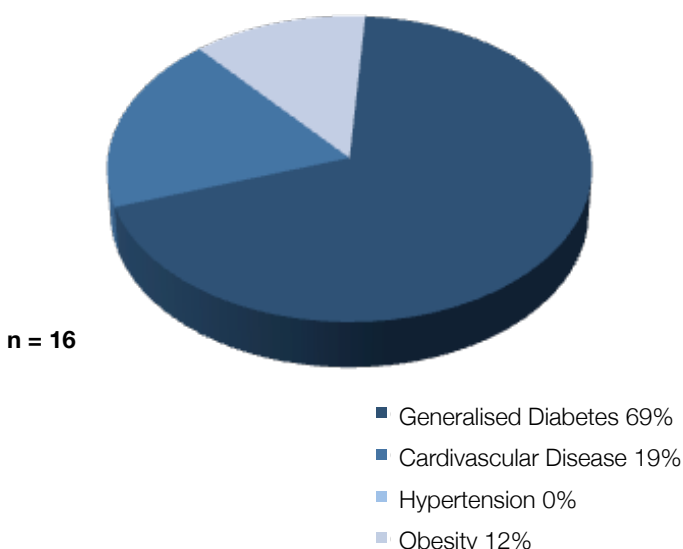
Looking forward, it is worth bearing in mind some of the developments taking place in the wider market that could shape future social media discussions. Commentary may relate to the scandal with Mediator, the weight-loss drug which has been blamed for hundreds of deaths and injuries in France. Servier is the subject of various legal cases and the company is also trying to negotiate settlements with various patients. From an external perspective, negative commentary in the UK regarding the Medtronic insulin pump, may be picked up by French commentators.

Nevertheless, at present, French social media discussions are positive in tone and the pharmaceutical industry's activities in the diabetes therapeutic area are being noted, which bodes well for companies active in this field.

2.0 Company Image

Company image represented only around 3% of the general commentary monitored in France. Despite this relatively low volume, some interesting patterns could be discerned. Companies were discussed in the context of disease, with the vast majority of mentions relating to generalised diabetes and some mention of obesity and cardiovascular disease. There was particular focus on marketing approval for anti-diabetic medications, with this aspect representing 38% of mentions.

Company Image Discussions by Disease



3.0 Drug Mentions

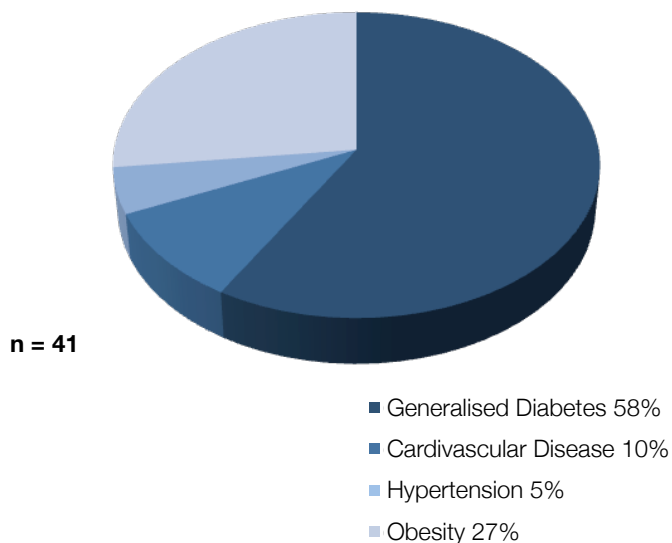
Forums and social networks provided 30% of the commentary on drugs, reflecting a healthy outlet for patient opinions. A sense of community was apparent in these discussions, with patients keen to talk about how their diseases were treated with drugs, and seeking feedback from fellow patients or advisors. These discussions were sometimes very specific in nature, with mentions of detailed clinical parameters and time-related changes with respect to the medication prescribed.

Metformin dominated the drug conversations, with it being discussed by patients as part of their diabetic treatment regime and often as an alternative to insulin. Another aspect of the metformin that prompted discussion was a study suggesting its potential role in cancer prevention.

4.0 Healthcare Provider Commentary

French healthcare professional discussions were mainly identified on a weight loss website, followed by Twitter and healthcare forums. The bulk of commentary in these arenas was on general aspects of diabetes (60%), but hypertension also featured strongly among the discussions.

Commentary identified by disease area



With respect to contributors to such discussions, only 6% of could be identified as healthcare professionals, including physicians, nurses and medical journalists. Over a fifth of the discussions by French healthcare professionals concerned raising the awareness of diabetes, detailing its prevalence and dangerous link to hypertension. High blood pressure was referred to as “the silent killer” with a warning of it being an underlying condition that might not exhibit symptoms for years, or decades, before finally damaging critical organs. Other important aspects discussed included the disease journey experienced by patients and the lifestyle changes resulting from diabetes.

Commentary from French healthcare professionals also highlighted their interest in the trends around the disease that would complicate its management in the future. Of note, the discussions centred on predicted trends that would drive an increase in diabetes up to 2030. Factors such as the increase in obesity and sedentary lifestyles were cited as exacerbating factors.

Reflecting the need to tackle this disease threat, prevention strategies, involving lifestyle changes were frequently recommended to minimise the risk of developing diabetes. In fact, the expertise of the key healthcare influencers identified in social media commentary lay in prevention strategies rather than treatments.

A variety of recommendations were put forward, such as chewing gum rather than eating sugary snacks, maintaining a ‘Mediterranean’ diet to prevent type II diabetes, reducing carbohydrates and processed foods and stabilisation of blood sugar levels enabling the avoidance of cravings resulting in eating less and therefore losing weight. It was clear that healthcare professionals would like to see an improvement in the level of knowledge demonstrated by

patients. Measures that could be taken included better awareness of health factors such as through annual eye checks. They were keen that their commentary on such points was shared to trigger patient action.

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.

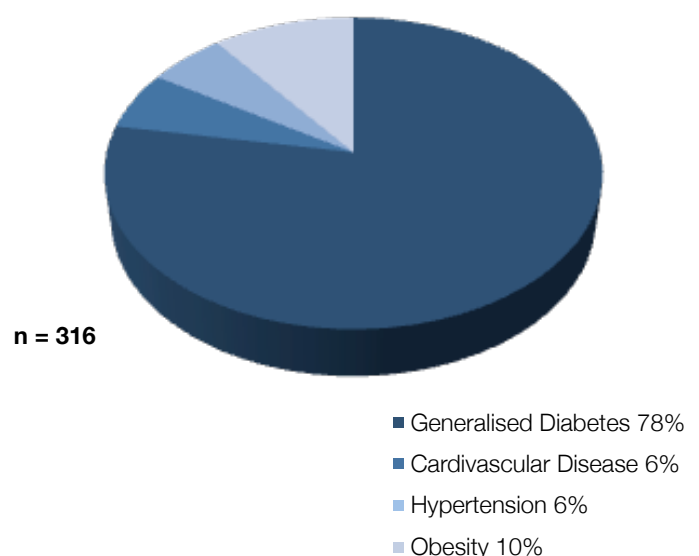
The discussions identified revealed a strong interest in not only dealing with the disease impact at present but also trying to shed some light on what the future diabetes landscape might look like. In this respect, it was evident that social media commentators were not restricting themselves to France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

5.0 Patient Commentary

Forums and social networks provided 30% of the commentary on drugs, reflecting a healthy outlet for patient opinions. A sense of community was apparent in these discussions, with patients keen to talk about how their diseases were treated with drugs, and seeking feedback from fellow patients or advisors. These discussions were sometimes very specific in nature, with mentions of detailed clinical parameters and time-related changes with respect to the medication prescribed.

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Commentary identified by disease area



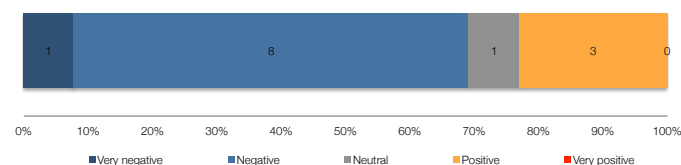
In line with the profile of discussions for healthcare professionals, commentary by bloggers, forum members and patients and their relatives was around the general aspects of diabetes, although cardiovascular disease, hypertension and obesity did feature in some commentary.

Of particular note were the posts exhibiting sentiment, which were primarily from patients and negative in tone. The views expressed highlighted the noticeable impact that diabetes was having on their lives and their anxiety over managing their health. Patients appeared to gain some reassurance through discussing their diagnosis in the context of their disease journey. Where symptoms featured in conversation, they were around muscle pain and leg swelling.

Some discussions focused on specific personal circumstances, such as the negative impact that obesity had on life, health and relationships. The wider impact of diabetes was also apparent, with accounts from parents detailing their struggle in ensuring that their children had access to good treatments.

There was great interest in better understanding the disease and so discussions also centred on the role of risk factors. Specifically there was mention of how the lack of exercise could lead to obesity, then diabetes, followed by clogging of blood vessels. Additionally, family history was also discussed as a risk factor for gestational diabetes.

Sentiment demonstrated in disease journey discussions



n = 13

The supportive social networks revealed by these discussions illustrate the desire by patients and their families to improve healthcare outcomes, and adopt preventative strategies such as regular monitoring. In some cases, patients were encouraged after hearing other accounts of lifestyle changes, such as improved diet and increased exercise which had led to a positive effect on life as well as improved health. Overall, it was clear that patients were dissatisfied with the current approaches available to control and treat diabetes. Consequently, they sought advice from others on insulin injections and views on which of the insulin pumps were most effective.

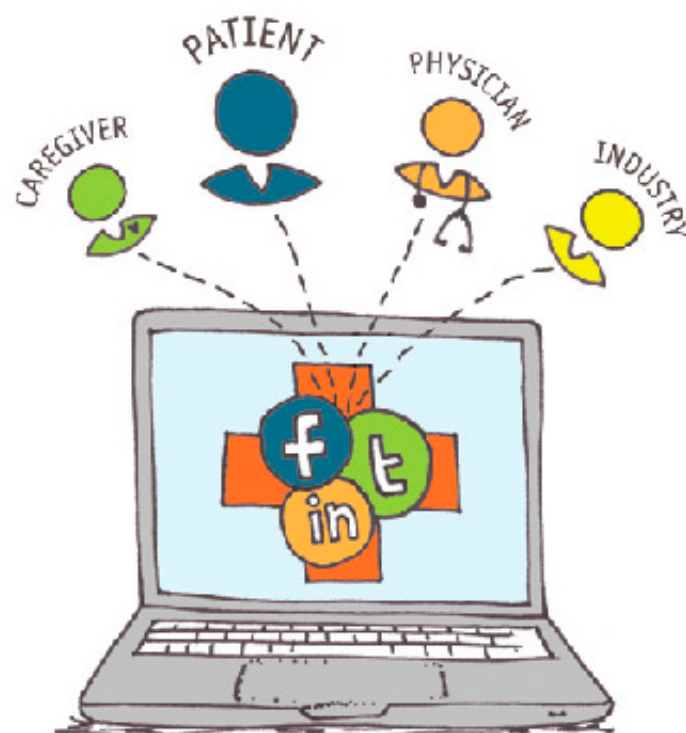
The diversity of discussion themes illustrate the important role that French patients and their supporters believe social media platforms have in improving the future for diabetes and the strong sense of community that is building between the different contributors.

6.0 Conclusions

It is clear from the review of the French social media scene that numerous stakeholders are actively participating in online discussions concerning diabetes. While the level of discussion of the pharmaceutical industry may be considered low relative to other European markets, the activities of companies are attracting a keen following by healthcare professionals, media and patients alike. For companies, the social media outlook appears promising, although they should monitor legal developments relating to the Mediator scandal and the public response.

Overall, there is a desire by both healthcare professionals and patients to adopt measures that can improve healthcare outcomes as well as share knowledge regarding preventative measures and new treatment options. Furthermore, social media is offering French patients and their families the means to gain reassurance and support in dealing with the wider difficulties they face as a result of diabetes.

This preliminary snapshot of the French social media scene in the context of diabetes reveals it as a dynamic environment involving different healthcare stakeholders. Regular monitoring of the different aspects that arose in the analyses will be helpful in identifying future trends and emerging issues that will influence the diabetes market.



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:
 - Novo Nordisk's patent application for its GLP-1 Agonist
 - Orexigen Therapeutics' partnership with Takeda
 - Interest in beyond the pill technologies such as production advances for Eli Lilly's high speed filling line of insulin cartridges and Johnson Electrics miniature engine for insulin pumps
 - Ongoing discussion around Servier's Mediator
 - A focus on high blood pressure as the 'silent killer' within diabetes
 - Interest in broader measures to prevent, rather than manage, diabetes and associated studies mentioned



Appendix

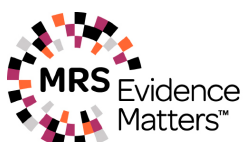
About pharmaSocial Intelligence International

Dr. Mo Sacoer 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.



PharmaSocial Intelligence International is a member of:



Contact us

Dr Mo Sacoor MBChB MRCP

Chairman and Ceo

pharma**Social** intelligence International
Rosemount House
Rosemount Avenue
West Byfleet, Surrey
KT14 6LB

T: (+44) 0800 023 6268

M: (+44) 7711 749 521

E: mo.sacoor@pharmasocialintelligence.com

W: www.pharmasocial-intelligence.com

Janet Gunner

Managing Director

pharma**Social** intelligence International
Rosemount House
Rosemount Avenue
West Byfleet, Surrey
KT14 6LB

T: (+44) 0800 023 6268

M: (+44) 7590 389 476

E: janet.gunner@pharmasocialintelligence.com

W: www.pharmasocial-intelligence.com



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Delivering Intelligence to our **Healthcare** Clients