

Diabetes in China

Study investigated patients' attitudes and practices in managing their disease to provide greater insight into this escalating problem

CHALLENGES

Current statistics indicate that over 43 million people in China have been diagnosed with type 2 diabetes and that figure is set to continue to rise with the increased urbanisation of the country and the adoption of more Western lifestyles. This means that China is a huge growth market for diabetes brand owners. With no formal referral process, patients are free to see whichever doctor they choose, as long as they can afford it, which results in lots of doctor-hopping and selection based on word-of-mouth. Hospitals rely on revenue generated by patients, many of whom pay a proportion of their consultation and treatment costs, so patients are looking for an effective treatment at a price they can afford. The problem for the pharmaceutical industry was to uncover greater understanding of Chinese patients.

SOLUTION

The research study 'Living with Diabetes' was carried out by The Research Partnership in response to this need. Unlike many research studies, where the doctor provides information using patient medical forms, this study aimed to get a direct understanding of patients' attitudes, behaviours, thoughts and feelings towards living with their illness. It provided pharma marketers with the information they needed to develop more effective communication strategies for doctors and patients. In China, a patient/doctor consultation may last less than 10 minutes, so it is critical that the doctor is able to understand the patient's needs and treat as efficiently as possible. Any guidance that the pharma company can offer will help improve the patient/doctor interaction, which in turn improves adherence, perception of the brand and ultimately, days of therapy.

The study was carried out using face-to-face interviews. To ensure a wide geographical spread in the most important markets, patients were screened and recruited from Tier 2 and Tier 3 hospitals (medium-sized and large hospitals) across Tier 1 and selected Tier 2 cities, where the majority of drug sales are made, namely:

- **Northern: Beijing and Dalian**
- **Eastern: Shanghai and Nanjing**
- **Western: Chengdu and Xi'an**
- **Central: Wuhan**
- **Southern: Guangzhou.**

RESULTS

The study collected comprehensive information about:

- Patient health status and concomitant conditions
- Use of blood glucose meters and attitudes to testing
- Attitudes towards diabetes and impact of diabetes on the patient's life
- Attitudes towards physician interaction, diet and lifestyle modification issues
- Treatment regimes, perceptions and experiences of specific therapies
- Patients' wishes and unmet needs.

It found that, for people in China, life with diabetes carried a price,

not just on their physical health, but also on their wallet, their time and their overall enjoyment of life. Although patients were able to reimburse some of their healthcare costs, on average they spent 421 RMB (£40, US\$64) per month on out-of-pocket expenses treating their condition and travelling to the hospital for treatment. They also spent almost 11 hours per month managing their illness. Insulin users had to spend the most out-of-pocket, close to double that of OAD users. Given that the average earnings are reported to be about 4,500 RMB (£427, \$684) per month in Tier 1 cities Beijing and Shanghai and around 2,000 RMB (£190, \$304) per month in Tier 2 cities (Wu Han: average annual income in 2010: 20,806.32 RMB; Xi'an: average annual income in 2010: 22,244 RMB; Nan Jing: average annual income in 2010: 28,312 RMB), treating diabetes is a considerable expense, even for wealthy Chinese. Despite this, the survey found that only one in five patients asked their doctors for less expensive treatments.

The study revealed that a third of patients in China did not feel they were successful in managing their diabetes and one in ten felt that their doctor was annoyed with them about it. Half of patients reported that having diabetes impacted many aspects of their life, including their ability to work, to engage in family activities and to sleep properly, with 10 per cent saying it had a major impact on their sex drive and general mood.

A segmentation analysis was carried out on the survey data, which presented five clear patient profiles and offered guidance on ways to target them.

For example, working with a pharmaceutical company, The Research Partnership developed a segment ID tool for doctors, which would enable them to identify which type of patient they were seeing. The tool, which comprised a number of key questions for the patient, equipped the doctor with the ability to develop an effective treatment strategy for that patient. The doctors were also able to understand how to educate their patients so that they became better at managing their condition.

Patient research of this kind offers a number of benefits to pharmaceutical marketers:

- 1. It gives much better insight into patients' attitudes and behaviour about their condition and how they are managing their illness**
- 2. The information allows the marketer to develop effective communication strategies for both the doctor and the patient**
- 3. The doctor/patient relationship is improved, which results in better treatment programmes and a better perception of the brand**
- 4. Satisfaction with the treatment programme leads to greater adherence and a greater likelihood of staying on therapy.**

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