

# Diabetes insights

**Studying the attitudes and experiences of patients living with diabetes in different countries can be invaluable to guide effective communication plans. With access to an ever-increasing plethora of sources, ranging from friends and family to charitable organisations and numerous online resources from websites to online forums and communities, consumers are becoming increasingly knowledgeable about their illness and treatment options. Therefore, pharma marketers should be paying more attention to the voice of the patient.**

**Proposals for patients to have better access to high quality information on prescription medicines have been received favourably by the European Parliament, so it is likely that pharmaceutical companies will need to ensure that they are giving patients access to accurate, clear and unbiased information, which also resonates and engages with their audience. In Asia, where patients often have to fund at least a proportion of their treatment, positive perception of the brand is critical. A better understanding of patients is therefore essential in order to communicate with them effectively.**

## Living with diabetes

Patient research can offer greater insight than data gathered by physicians using patient medical forms, as has been found in our own studies, which seek to understand patients' attitudes, behaviours, thoughts and feelings towards living with chronic illnesses. One of these, 'Living with Diabetes', looked at life from the perspective of patients with type 2 diabetes. The study was conducted online with over 2,000 type 2 diabetes patients from the UK, Germany and the US. Later, a similar study was carried out face-to-face among 1,000 patients in the major cities of China. The aim of both studies was to understand how life with diabetes impacted on patients and how this related to the treatments they received, as well as whether there were many differences between their attitudes and behaviours or similar threads running across countries.

A segmentation analysis was applied to the data, which showed that there were identifiable patient groups with similar attitudes and feelings about life with diabetes, who could be targeted. The segmentation enabled pharma marketers to understand particular patient attitudes and likely responses to dialogue and treatment programmes advised by their physicians. Consequently, pharma marketers could use the segmentation to design communications strategies, which resonated better with their intended audiences.

## A growing market

Type 2 diabetes is a major lifestyle-related illness, currently affecting around 200 million people globally. As more countries adopt a westernised approach to eating and exercise, this figure is set to reach 366 million by the year 2030, according to projections made by the World Health Organisation. Diagnosis rates are also reported to be low, meaning that many more people are likely to be diabetic but they are not aware of it and have not yet been diagnosed. The market for diabetes management is huge and growing, particularly in the pan-Asia region.

The two main product lines are insulins and oral anti-diabetic (OAD) therapies. Once a patient is on a particular treatment path,

it is highly likely that he/she will continue along this path, using a particular brand of medication for quite a few years. To a high degree, attitudes and behaviours, typified in the segmentation, provide a predictor for rapidity of progress along the pathway.

In the Living with Diabetes market research study, patients were asked questions about how they felt about having diabetes, its impact on their lives, how it affected relationships with their family and friends, how well they believed they were managing their diabetes, as well as questions on current treatment programmes, their use and attitudes towards blood glucose meters, interactions with the doctor and general feelings at diagnosis and currently.

The study found that while there were commonalities among patients, in different countries patients responded differently to certain aspects of life with diabetes.

For example, while most patients from Germany and the UK felt in control of their condition, in China and the US around a third of patients did not feel that they were successful at managing their diabetes (Figure 1). Patients in all countries overall felt that they had accepted their condition, but for some it had considerable impact on their lives, relating to their general mood and extending to include aspects of their sex lives.

## Blood glucose monitor use

In the US, patients were much more likely to use a blood glucose monitor (BGM) (76 per cent) than in China, where over three quarters reported not using one. In the UK and China, the main reason cited for not using one was because patients said they had been advised that they did not need one. As authorities like Diabetes UK recommend regular blood monitoring to stay in control of the illness, perhaps pharmaceutical companies with diabetic products have a role to play in further educating both patients and doctors about the importance of regular blood glucose monitoring. Indeed, around half of patients across all markets studied felt there was an opportunity for more work to be done on raising overall awareness about diabetes and what puts people at risk.

The major motivation for patients in the US and UK to control their diabetes was to avoid future health problems. German patients were more worried about avoiding having to use insulin, but in Germany, they were less aware than in the US and UK about the types of conditions that could arise from having type 2 diabetes. Among diabetes specialists, current thinking is that early insulin use reduces the risk of getting associated conditions. In China, surprisingly, where use of BGMs is quite low, patients were most concerned about avoiding high blood glucose levels. Marc Yates, managing director, Singapore commented: "The study found that patients in China are not very aware of future problems related to diabetes,

FIGURE 1. SUCCESS MANAGING DIABETES



Source: The Research Partnership

especially problems with circulation and nerves/neuropathic pain.”

Patients in all countries who were aware of all the conditions that might result from having type 2 diabetes, experienced significant levels of worry about them.

### Relationships with doctors

When asked about their relationships with their doctors, most patients in all the countries surveyed felt that their doctor took their diabetes seriously and listened to them, although in the US almost a quarter of patients reported that they felt their doctor was annoyed that they were not managing their diabetes well.

Most physician advice was centred around eating more healthily and exercising more, although in the US and China, physicians were more likely than those in the UK or Germany to advise taking vitamins or nutritional supplements as well.

Approximately three quarters of patients in all markets had been prescribed OADs at some point, with around a quarter having been on insulin and about a quarter on no medication but managing through diet and exercise. Biguanides were the mainstay of OAD therapy across all markets, especially the UK, but in China patients were mostly prescribed alpha-glucosidase inhibitors. Metformin tablets dominated in US, UK and Germany, but in China Metformin use was outweighed by Glucobay, which was prescribed to a third of patients. For insulin users, Lantus had the largest share across the US, UK and German markets, with Novolin leading in China. When first injecting insulin, anxiety was considerable among the majority of patients in all western markets, but considerably less of a worry to patients in

China. However, almost half of all respondents said they became comfortable with injecting insulin within one to two months.

Many patients with type 2 diabetes seemed to be in denial about the extent to which their lifestyle affected their health. Over half of patients were also receiving treatment for high blood pressure and high cholesterol and the majority were overweight. Over half claimed to spend a lot of time thinking about their health, stating that they ate well and made sure they stayed healthy, but many were clearly not managing to stay on a good diet and exercise regime. The vast majority in the UK and US were clinically obese and around a third of patients from western countries never engaged in any physical exercise. In China, most patients claimed to exercise at least a few days a week, but only about a quarter put any emphasis on exercising, with many being more likely to put effort into eating well.

### Distinct patient segments

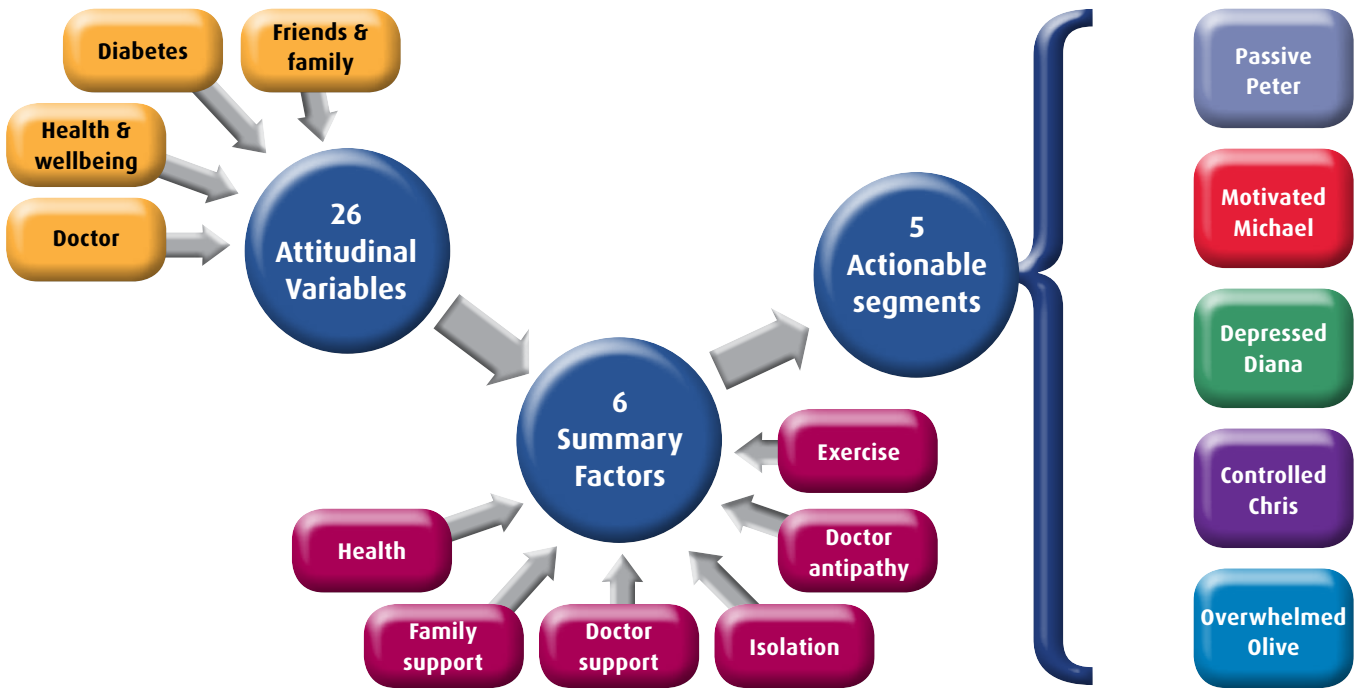
The segmentation of the two study findings revealed five distinct segments of patients with similar attitudes and behaviours across the western markets and four segments in the China market. Three of these segments seemed to overlap, but in China there was a younger segment in which patients were quite motivated to control their diabetes and try to take care of their health. In contrast, the West had a younger segment, which held quite negative feelings towards living with diabetes; they felt quite overwhelmed about their condition and believed they had poor relationships with their doctors. They were more likely to feel the doctor offered unrealistic advice and ‘nagged’ them to change their diet and exercise regime. The segmentation offered

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FIGURE 2. SEGMENTATION PROCESS



Source: The Research Partnership

detailed portraits on groups of patients with distinct attitudes, feelings and demographics to help marketers understand how to improve communications with their doctor, awareness of brand and guidance for improving treatment. Further analysis could be conducted based on the existing segmentation and the data could also be used to tie in with existing segmentation approaches that pharma may be using already.

**The Authors**

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