



PATIENTS IN FOCUS:

Type 2 diabetes treatment and perceptions

Phreesia

Life
Sciences

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Executive summary

Type 2 diabetes is one of the biggest markets in pharma. The rising prevalence of the condition has attracted many major drugmakers in recent decades, leading to innovations such as novel insulins, easier-to-use glucagon injections, improved glucagon-like peptide-1 receptor (GLP-1) agonists and molecules that fight targets such as sodium-glucose cotransporter-2 (SGLT2). Yet standing out in the competitive market remains difficult for drugmakers, and on the flip side, many patients aren't confident about their ability to manage their disease.

Nevertheless, opportunities remain to help diabetes patients better manage their condition, and studies show they are willing to try new medications, both to directly treat diabetes and to address comorbidities such as obesity.

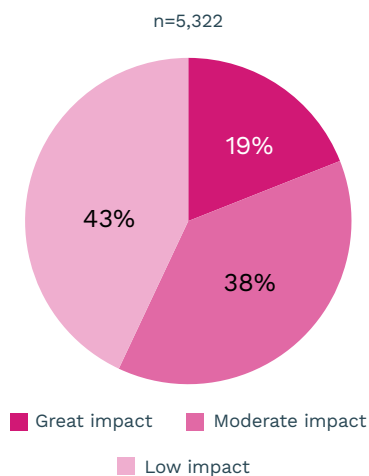
Using Phreesia PatientInsights survey results collected in December 2021 and January 2022 from 4,096 adults diagnosed with or treated for Type 2 diabetes checking in for their doctors' appointments, this report will explore patients' attitudes toward existing diabetes interventions and their openness to new treatments, as well as the pharma marketing messages that are most likely to resonate with them.

Introduction

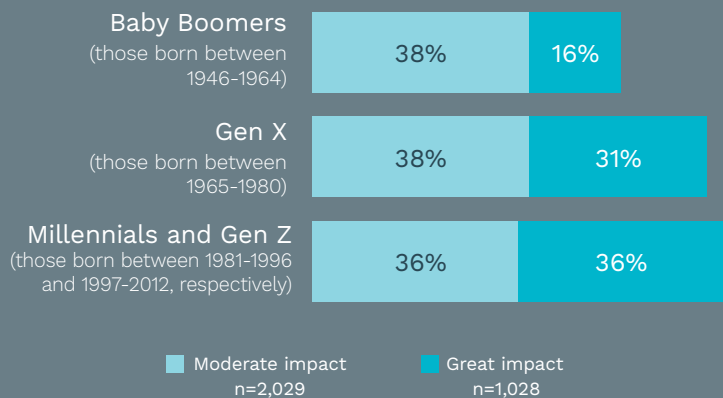
Approximately 1 in 10 Americans has diabetes, and 90% to 95% of those cases are Type 2.¹ The prevalence of the condition, which has been predicted to increase by more than 50% between 2015 and 2030, has brought the total cost of diagnosed diabetes in the U.S. to more than \$320 billion.² That total cost includes \$90 billion in reduced productivity, underscoring how Type 2 diabetes negatively affects patients' quality of life despite advances in treating and managing the disease.

The ongoing impact of diabetes on patients is clear: 57% of survey respondents said Type 2 diabetes has a moderate-to-great impact on their daily life. Those negative effects are most severely felt among younger diabetics: The proportion of patients who said their condition has a great impact on their lives rose from 16% in the Baby Boomer generation to 31% in Generation X and 36% in the Millennial population and Generation Z.

How much has Type 2 diabetes impacted your everyday life?



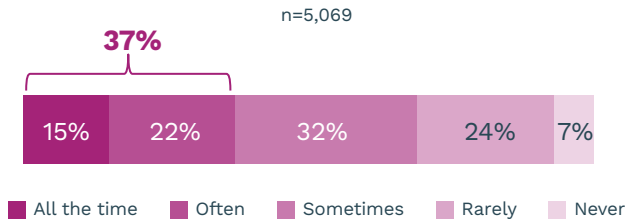
Generational differences of patients reporting an impact on everyday life*



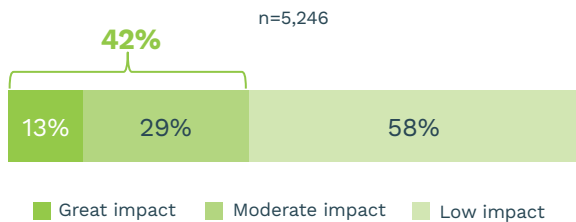
*statistically significant at >95% confidence interval

Meanwhile, more than one-third (37%) of survey respondents said they worry about their diabetes often or all the time. And that worry is debilitating: 42% percent of respondents said their condition has at least a moderate impact on their mental health. Once again, mental-health concerns are most severe among younger patients, with 31% of Millennials and Gen Z-ers reporting a great impact, compared to 23% of Gen X-ers and 9% of Boomers. That data not only reveals the limited support Type 2 diabetics currently receive, it also offers an opportunity for pharma to close the gap.

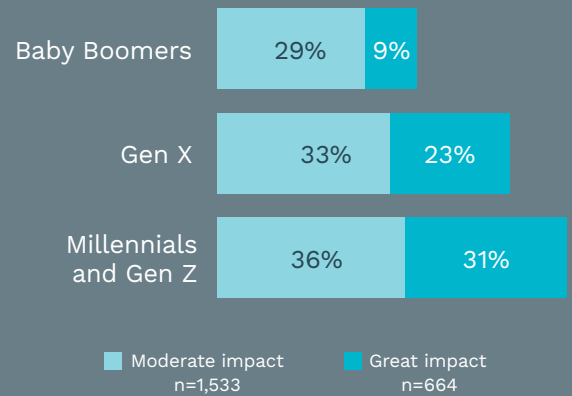
How often do you worry about your Type 2 diabetes?



How much has Type 2 diabetes impacted your emotional/mental health?



Generational differences of patients reporting a great impact on mental health

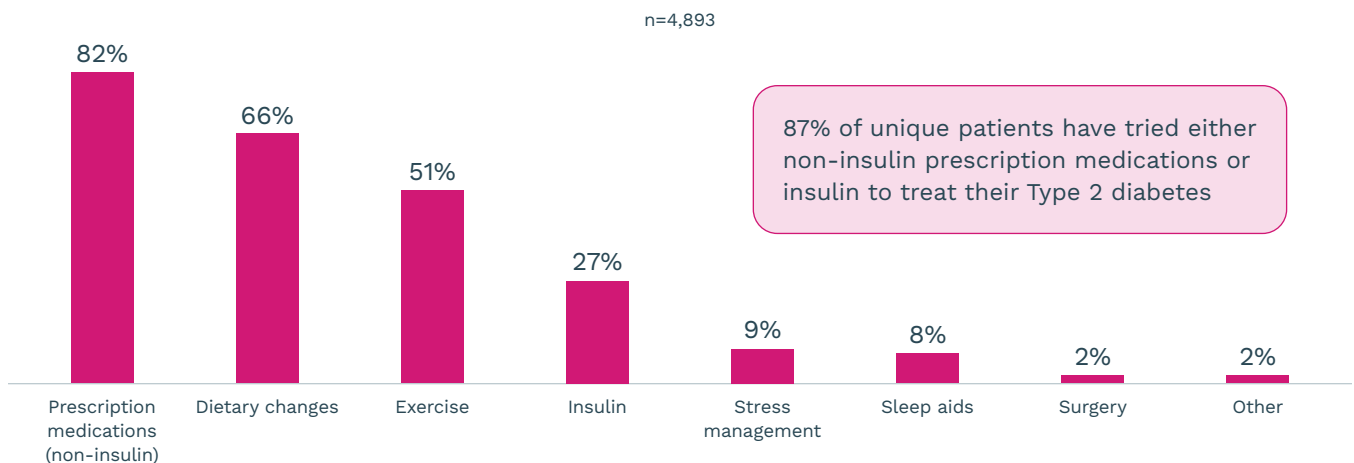


Improving brand awareness

The Phreesia survey data indicates two complementary paths to improved outcomes for Type 2 diabetes patients—medication and lifestyle changes. On the pharmacological side, pharma marketers have an opportunity to raise patients’ awareness about the range of diabetes medications available to them, thereby motivating their transition to those brands that best meet their specific needs.

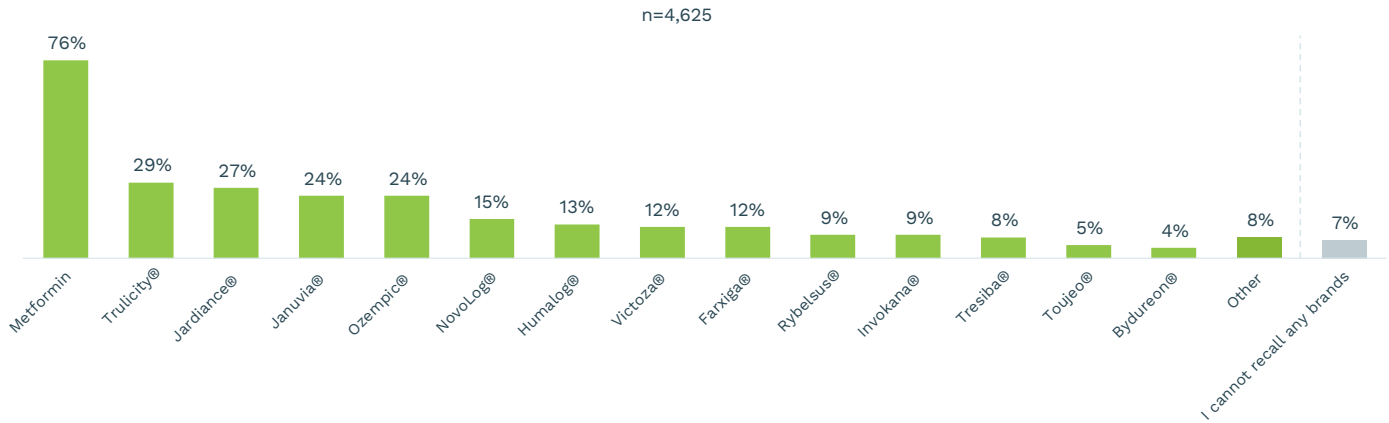
According to the survey data, pharma marketers likely will find patients receptive to trying prescription medications to manage their Type 2 diabetes. Among the polled diabetics, 87% have tried insulin and/or non-insulin prescription medications to treat their conditions.

What kind of Type 2 diabetes treatments have you tried? Please select all that apply.

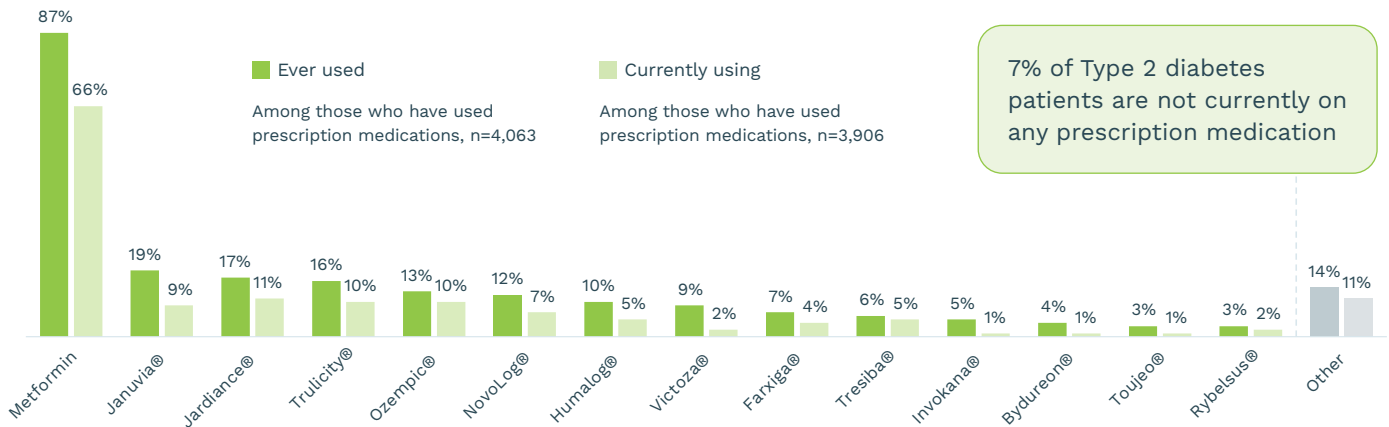


Still, diabetes treatment knowledge remains limited. Some 76% of respondents had heard of metformin, a generic diabetes drug. However, no other product was recognized by more than 30% of respondents, with Eli Lilly’s Trulicity (29%), Lilly and Boehringer Ingelheim’s Jardiance (27%) and Merck’s Januvia (24%) listed as the next-most-recognized diabetes drugs. Those figures are in line with their use: 87% of respondents have tried the off-patent metformin, but the survey showed a steep drop in prescription use after that to the 16%, 17% and 19% of respondents who have tried Trulicity, Jardiance and Januvia, respectively.

Which of the following prescription brands come to mind for Type 2 diabetes? Please select all that apply.



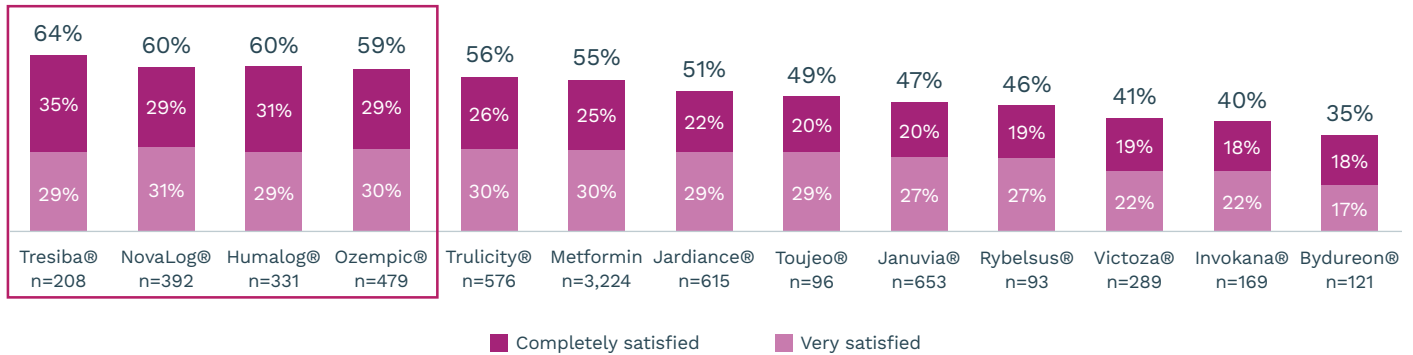
What prescription medications have you ever used/are you currently using to treat your Type 2 diabetes? Please select all that apply.



Responses to another question further indicate that only a fraction of patients are aware of medications that appear to best meet the needs of Type 2 diabetics. Survey respondents who had taken Novo Nordisk’s Tresiba, NovoLog or Ozempic or Lilly’s Humalog were most satisfied with their treatments. Tresiba led the way, with 35% of respondents reporting complete satisfaction with the drug and 29% reporting being very satisfied with it.

By comparison, satisfaction is lower among medicines that are better known and more widely used by the survey's respondents. Only 20% of respondents said they are completely satisfied with Januvia, the most commonly tried diabetes drug after metformin. This data indicates that pharma marketers may be able to improve patient satisfaction by raising awareness about top-performing medications and persuading patients to switch.

Among those on treatment, how satisfied are you with these medications for Type 2 diabetes?

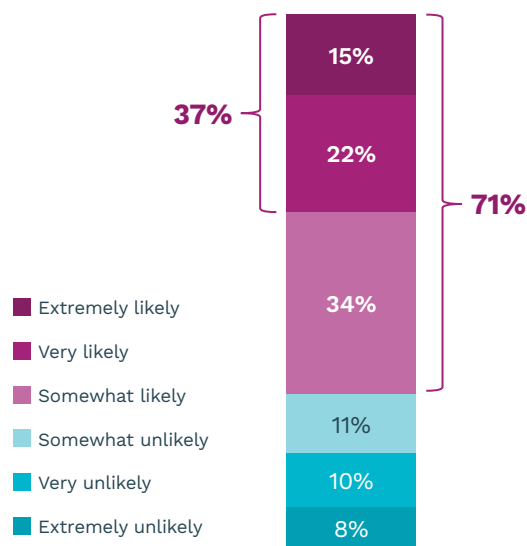


Driving conversions to new medications

Given patients' relatively low levels of satisfaction with many diabetes medications, survey results show they are open to making that switch. Indeed, 71% of respondents said they are likely to try a new medication for Type 2 diabetes, and 37% are very or extremely likely to try a new drug.

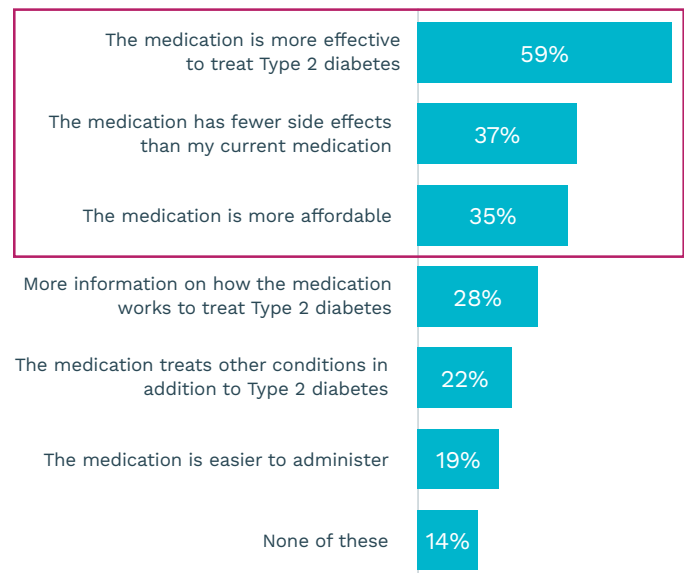
How likely are you to try a new medication for Type 2 diabetes?

Among those who have tried a medication
n=4,126



What information motivates you most when choosing a new medication for Type 2 diabetes? Please select all that apply.

n=3,861

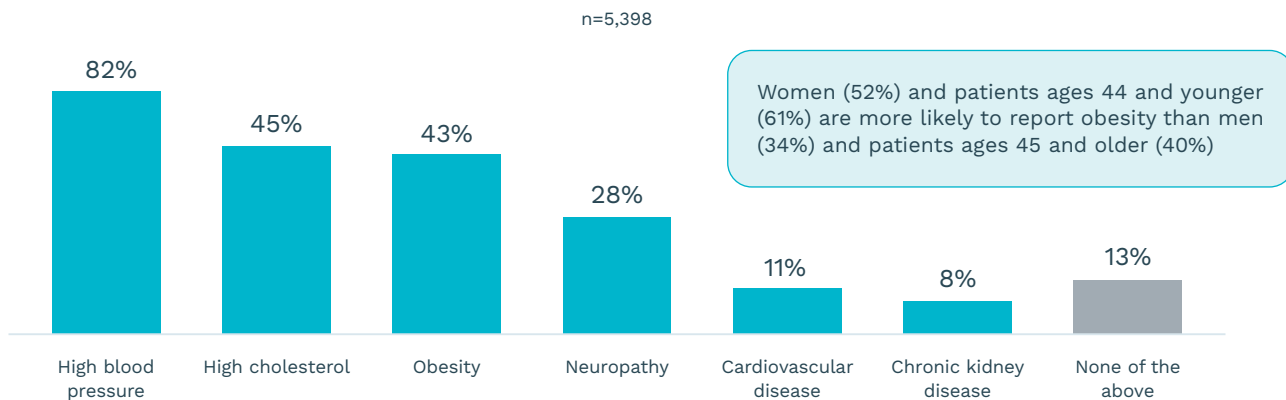


More than half (59%) of respondents said they would try a new medication if it was more effective in treating their Type 2 diabetes, making effectiveness the top motivator for switching brands. But other factors are relevant, too: 37% of respondents are motivated to switch if a new medication has fewer side effects than their current treatment, and 35% view the affordability of the treatment as a key motivator. The findings point to the potential for pharma marketers to compete on factors other than effectiveness.

Patients with Type 2 diabetes also are open to trying new medications to manage their comorbidities. High blood pressure (58%) and high cholesterol (45%) are the most common of these, followed by obesity, with almost half (43%) of survey respondents reporting being obese.



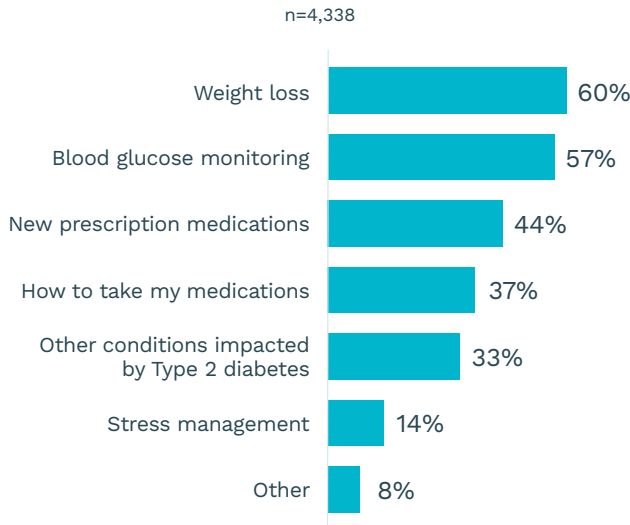
In addition to Type 2 diabetes, which of the following conditions do you have? Please select all that apply.



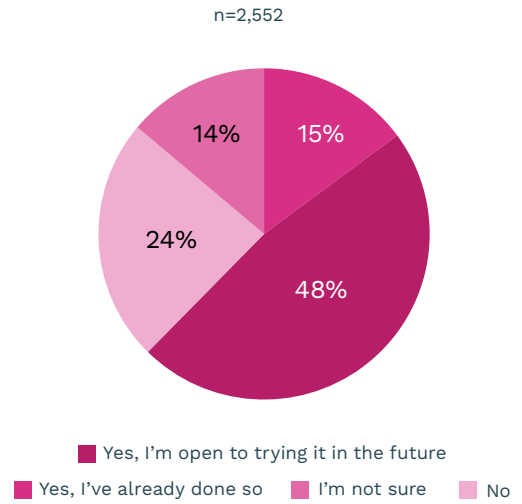
Some 60% of survey respondents have discussed weight loss with the main doctor who treats their Type 2 diabetes, and almost half (44%) have discussed new prescription medications. Those conversations could lead to adding weight-loss drugs to Type 2 diabetics’ treatment regimens since 63% of survey respondents said they are open to trying or have already tried weight-loss medications.

Because patients are so open to discussing weight-loss drugs with their providers, the point of care is a critical place to connect with them. Pharma marketers have a prime opportunity to reach patients with branded or unbranded awareness campaigns right before these discussions.

Which topics have you discussed with your doctor who treats your Type 2 diabetes? Please select all that apply.



Would you try weight loss medication as part of your Type 2 diabetes management?

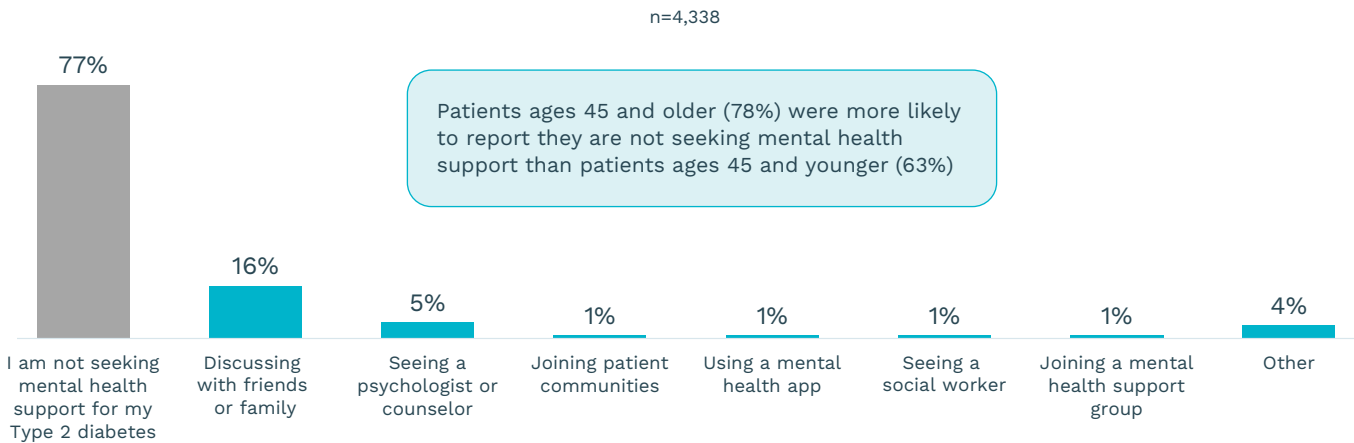


Going beyond the pill

Treating comorbidities is one of several ways that pharma companies can expand how they support Type 2 diabetics. The PatientInsights data illustrates multiple opportunities for pharma that go beyond the pill, with many respondents reporting that they are not getting the support they need.

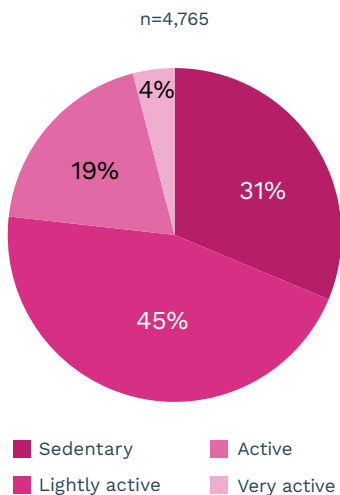
Take mental health: While Type 2 diabetes clearly impacts the mental well-being of many patients, 77% of survey respondents said they are not seeking any mental health support. The most common support that patients seek is talking with friends or family (16%). This major gap between the prevalence of patients' mental health concerns and their uptake of support presents an opportunity for pharma marketers to share resources that could help them.

What type of mental health support are you currently seeking or receiving for your Type 2 diabetes? Please select all that apply.

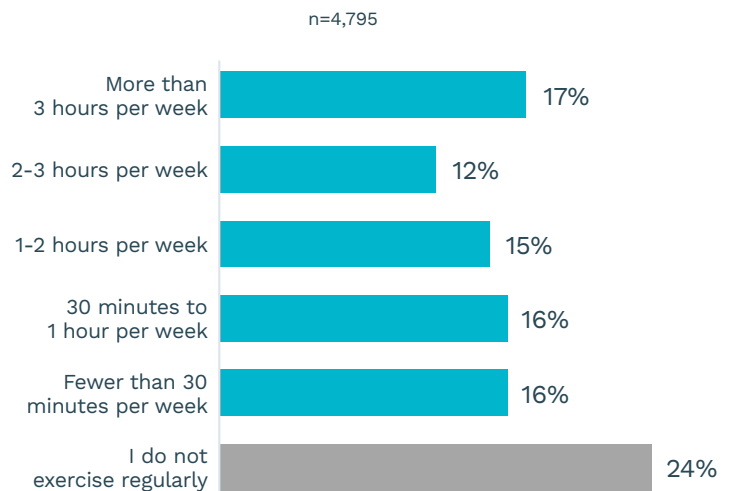


The survey also suggests that nonpharmacological treatments such as exercise, which many studies have found to drive Type 2 diabetes remission, are being underused.³ Indeed, 31% of the polled diabetics described their activity level as “sedentary.” Similarly, 16% of respondents said they exercise less than 30 minutes a week, and another 24% reported that they do not exercise regularly at all.

Which of the following best describes your activity level?



How often do you typically exercise each week?



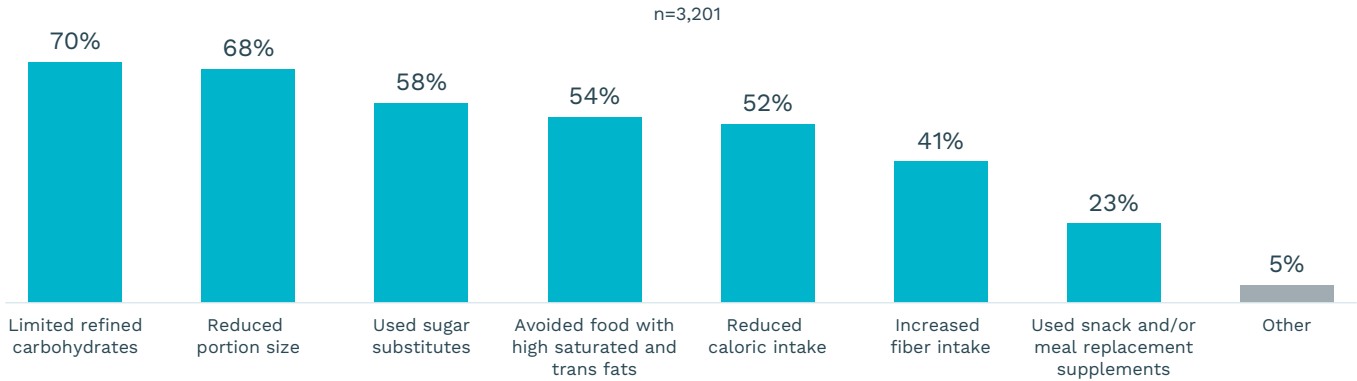
Among the two-thirds of respondents who have made dietary changes to manage their diabetes, limiting consumption of refined carbohydrates (70%), reducing portion sizes (68%) and using sugar substitutes (58%) were the most common changes. Those changes are in line with science, with studies suggesting that weight loss through caloric restriction boosts glycemic control and that restricting carbohydrates may help maintain weight loss.⁴ But it is unclear if survey respondents are following the intensive weight-management programs needed to improve outcomes.

If pharma marketers want to holistically support diabetes patients, they need to step in with tools that can help them monitor and maintain these key lifestyle changes—or find ways to help them easily find and access existing support tools.



What dietary changes have you made to manage your Type 2 diabetes? Please select all that apply.

Among those who have made dietary changes to manage their Type 2 diabetes

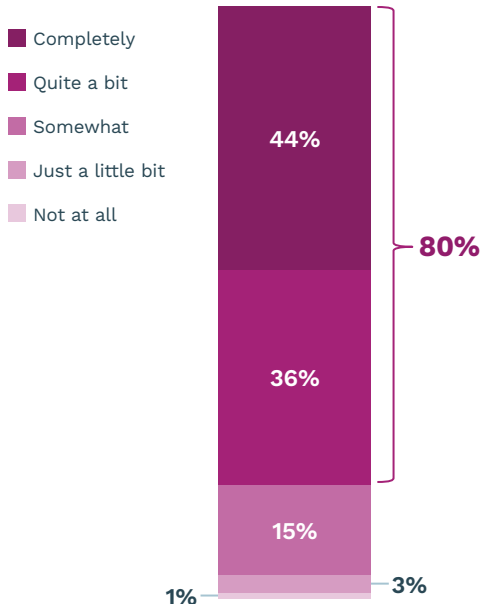


Communicating risks

The survey also found evidence that between one-third and one-half of patients with Type 2 diabetes do not know they are at increased risk for conditions including diabetic macular edema, kidney disease and cardiovascular disease. Survey data demonstrated widespread ignorance of diabetes complications, despite 80% of respondents saying that they adequately understood the risks of their disease.

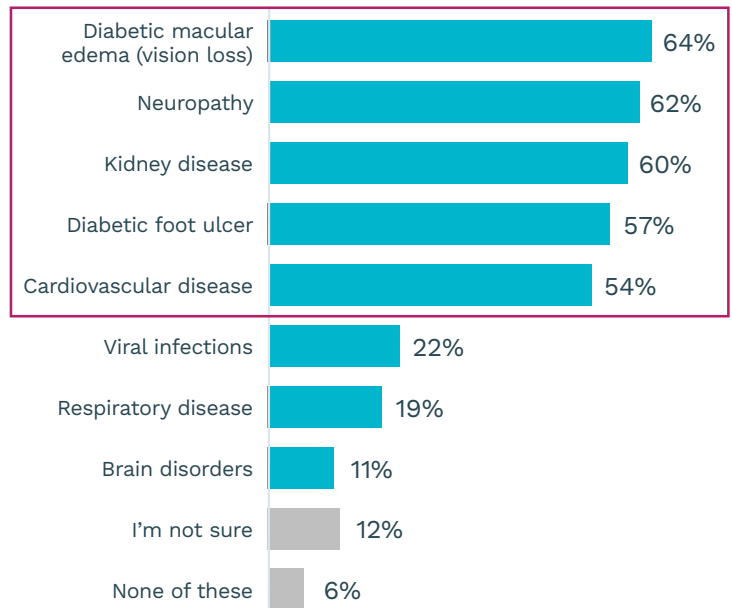
How well do you feel you understand the risks of Type 2 diabetes?

n=5,183



Which of the following conditions are you aware that you are at higher risk for due to your Type 2 diabetes? Please select all that apply.

n=4,924



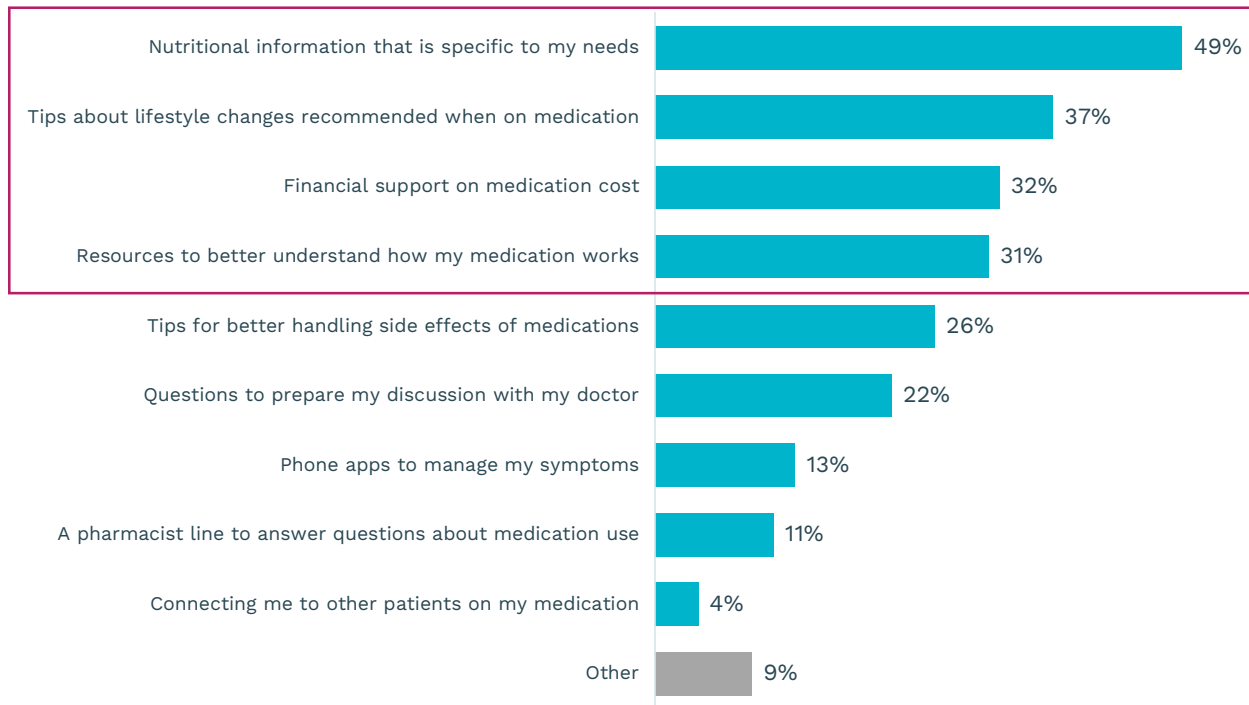
When diabetes patients mistakenly believe they understand their risks, they are less likely to ask their doctors key questions that could improve their disease management. Pharma can spur those important doctor-patient conversations by arming patients with educational resources before their appointments.

Today's diabetes patients seek personalized resources that address their particular needs and medications. Almost half (49%) of survey respondents cited nutritional information specific to their needs as their most-needed resource. Other popular requests included tips on recommended lifestyle changes when taking diabetes medications (37%); financial support to help cover the cost of medications (32%); and resources that could help patients better understand how their medication works (31%).



What kind of resources about Type 2 diabetes care would be most helpful to you? Please select up to 4 answers.

n=3,039





Recommendations for drugmakers:



Raise brand awareness at the point of care just before patients talk to their doctors to ensure that top diabetes treatment options are front of mind during patient-provider discussions



Provide comprehensive information about diabetes medications, including factors such as a drug's cost and side-effect profile, in addition to its effectiveness



Take a holistic approach to helping patients with Type 2 diabetes by offering treatments for their comorbidities along with information and support that empowers them to better manage their condition



Provide educational resources that explain increased medical risks diabetics face that they may not be aware of, including diabetic macular edema, kidney disease and cardiovascular disease, and present that information in ways that encourage patients who think they already have a good handle on their risks to learn more



Consider and cater for the impact of Type 2 diabetes on mental health, noting that younger diabetics have the most acute unmet need for support

About Phreesia Life Sciences

Phreesia empowers life sciences companies to connect meaningfully with clinically relevant patients, delivering targeted health content in a one-to-one setting. Our PatientConnect offering identifies and motivates the right patients to initiate meaningful brand conversations, and our PatientInsights product enables our clients to better understand their target patient populations.

Phreesia meets patients where they are, both virtually and in-person, and reaches them at multiple touchpoints throughout their healthcare journey.

To learn more about Phreesia Life Sciences, visit lifesciences.phreesia.com

End notes

- 1 "[Type 2 Diabetes](#)," Centers for Disease Control and Prevention, Dec. 16, 2021.
- 2 "[Diabetes 2030: Insights from Yesterday, Today, and Future Trends](#)," Popul. Health Manag., February 2017.
- 3 "[The Cost of Diabetes](#)," American Diabetes Association, March 22, 2018.
- 4 "[Diet and exercise in the prevention and treatment of type 2 diabetes mellitus](#)," Nat. Rev. Endocrinol., October 2020.

