



M3 GLOBAL RESEARCH REVIEW

DIABETES

M3 HIGHLIGHTS

M3 is actively engaged in recruiting physicians, patients, and ancillary care providers within this therapeutic space.

In 2015, M3 Global Research:

- Recruited ~24,000 HCPs to participate in research on the subject of diabetes - most interviews were completed with Endocrinologists / Diabetologists and Primary Care Physicians
- HCPs were recruited for ~150 unique projects
- HCPs were recruited across 17 countries

Across all topic areas, Endocrinology-focused diseases was an active area in 2015.

M3 Global Research:

- Completed over 13,000 surveys with Endocrinologists
- Endos were recruited for 190 unique studies
- Endos were recruited across 25 countries

In addition to our extensive global reach for primary research purposes, M3 Global Research provides several syndicated services in this sector including:

- The Complete Endocrinologist, part of our "complete series", a syndicated study by medical specialty which examines the challenges faced by Specialists (Endocrinologists in this case) in their daily practices
- Physician Map, a robust KOL mapping product which incorporates peer nomination, traditional desk research, and a social media review to identify KOLs within a specific therapeutic area
- Patient Map, a detailed examination of patient loads across 400 diseases and includes Endocrinology and Primary Care specialties

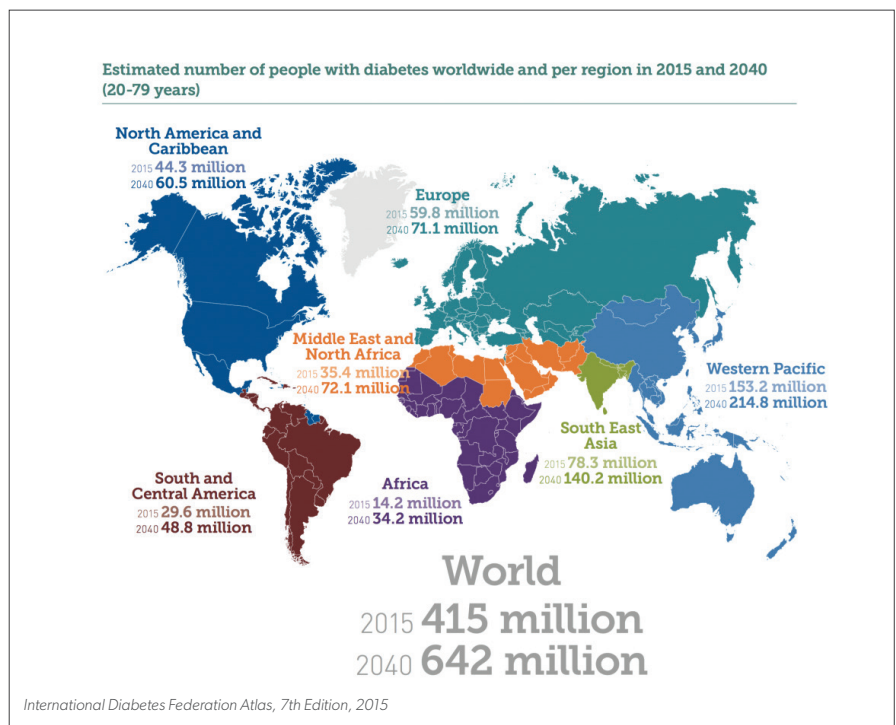
GROWING MEDICAL CONCERN

Diabetes remains a serious and growing medical concern in the USA and around the world. The global prevalence is estimated by the World Health Organization to be 9% among adults aged 18 or older. Rates are similar for the US population, as more than 29 million are estimated to have either Type 1 or Type 2 diabetes. Prediabetes is becoming more widely recognized as an emerging issue, as almost 40% of US adults over the age of 20 in 2012 (estimated 86 million people) had fasting glucose or A1C levels putting them at higher risk of developing Type 2 diabetes.

RISKS

Patients with diabetes are at much higher risk for other conditions as well. Major complications are seen in the heart, blood vessels, eyes, and nerves. Diabetes is a major cause of heart disease and stroke, and the leading cause of kidney failure, lower limb amputations, and new cases of blindness among adults. It remains the 7th leading cause of death, and may even be under-reported. The problem is just as severe outside the US as the WHO estimates that more than 80% of diabetes deaths worldwide occur in low- and middle-income countries.

Diabetes and its complications are a major cost to the US healthcare system. According to the American Diabetes Association*, more than 1 in 5 healthcare dollars in the U.S. goes to the care of people with diagnosed diabetes.



M3 GLOBAL RESEARCH

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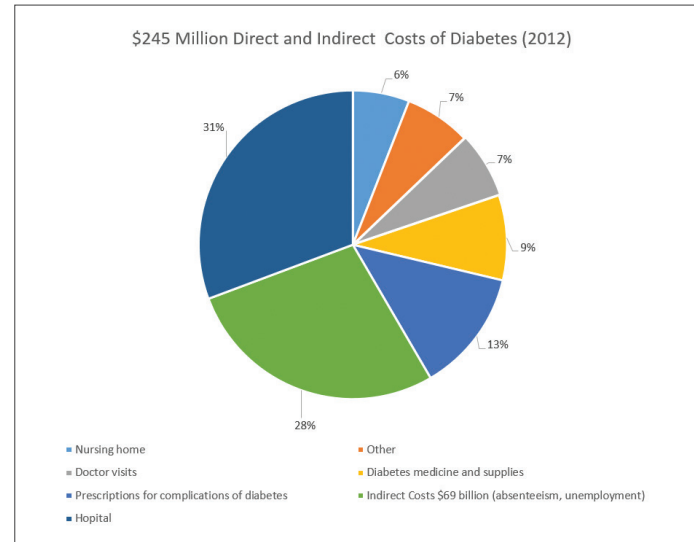
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TREATMENT

Primary care physicians treat many patients for diabetes in the USA, but Endocrinologists are a mainstay, especially for patients with Type 1 and severe Type 2 diabetes. This remains an area of high patient interaction in a chronic disease area as patient care often goes beyond simple medical issues to address the high level of preventive care and lifestyle coaching. Remote monitoring and telemedicine are expected to play a much larger role in the future, as patients become more comfortable with the influence of digital and mobile technologies into the lifestyle and healthy activities sectors.

Diabetes remains a very competitive market for many pharmaceutical and biotech companies. New and existing oral therapies and insulin products involve new formulations and extended dosing intervals to make it more convenient for patients to manage blood glucose levels. The competition intensified in 2015 as TV advertising for diabetes products dramatically increased with four new drugs adding TV to their promotional campaigns.



R&D PROGRESS CONTINUES ACROSS MANY FRONTS

- Research with adult stem cells altered to become insulin producing beta cells for transplant in the pancreas of patients with Type 1 diabetes are progressing towards clinical studies.
- Medical device companies are testing systems marrying a continuous glucose monitoring with an insulin pump to essentially create an artificial pancreas.
- Novartis / Alcon is working on a contact lens medical device to estimate blood glucose levels from tears.
- Newer research into the disease processes involved are looking at links with depression leading to lower motivation for diabetes care, exercise, and dietary care.
- Potential similarities between Alzheimer's and diabetes as amyloid deposits have been found in pancreatic beta cells in patients with Type 2 diabetes. Inhibition of proteins that contribute to amyloid deposits are being studied to see if they can prevent beta cell death in the pancreas.
- Diabetes is a very active area of market research on many fronts and continues to be a major healthcare issue around the world.

For additional information on accessing our robust panel of Endocrinologists or for additional information on our syndicated offerings please contact **Amber Leila Esco** at 202-293-2288 ext.236 or aesco@usa.m3.com.

PHYSICANMAP
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PATIENTMAP
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COMPLETESERIES
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