

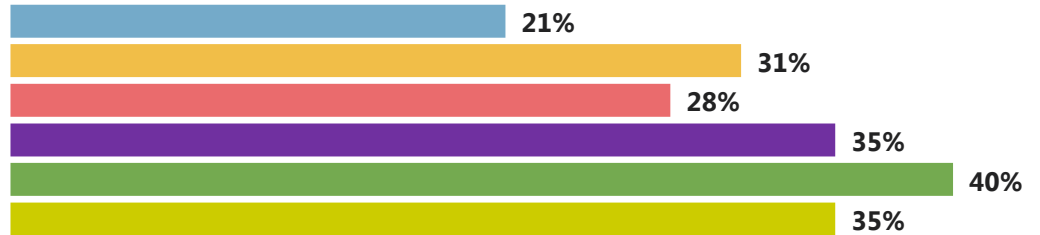
## To what extent are patients requesting information on specific treatments/technologies?

Overall, almost a quarter of patients (23%) requested information about Abbott's FreeStyle Libre in the last 12 months. Higher interest still was seen in France, China and Italy. Regarding Continuous Glucose Monitoring (CGM), Insulin Pumps and Automated Insulin Delivery Systems technologies, patients in China are the most likely to ask for information from their physicians.

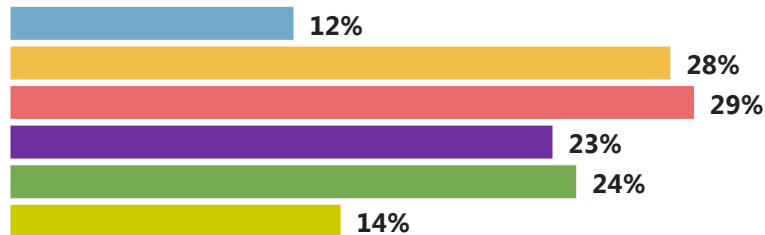
Showing % of patients per market – ranked by total level order



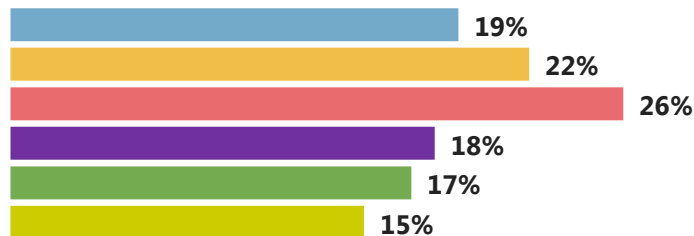
### New Pharmaceuticals



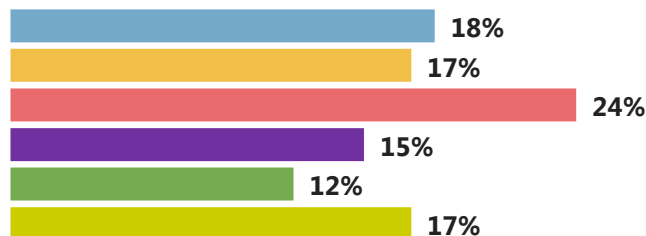
### Flash Glucose Monitors (Abbott FreeStyle Libre)



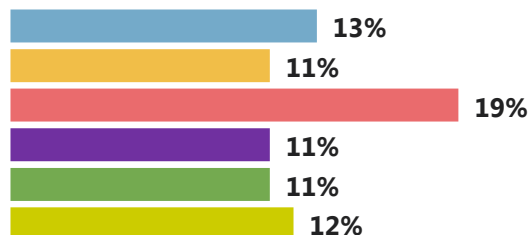
### Continuous Blood Glucose Monitor (CGM)



### Insulin Pump



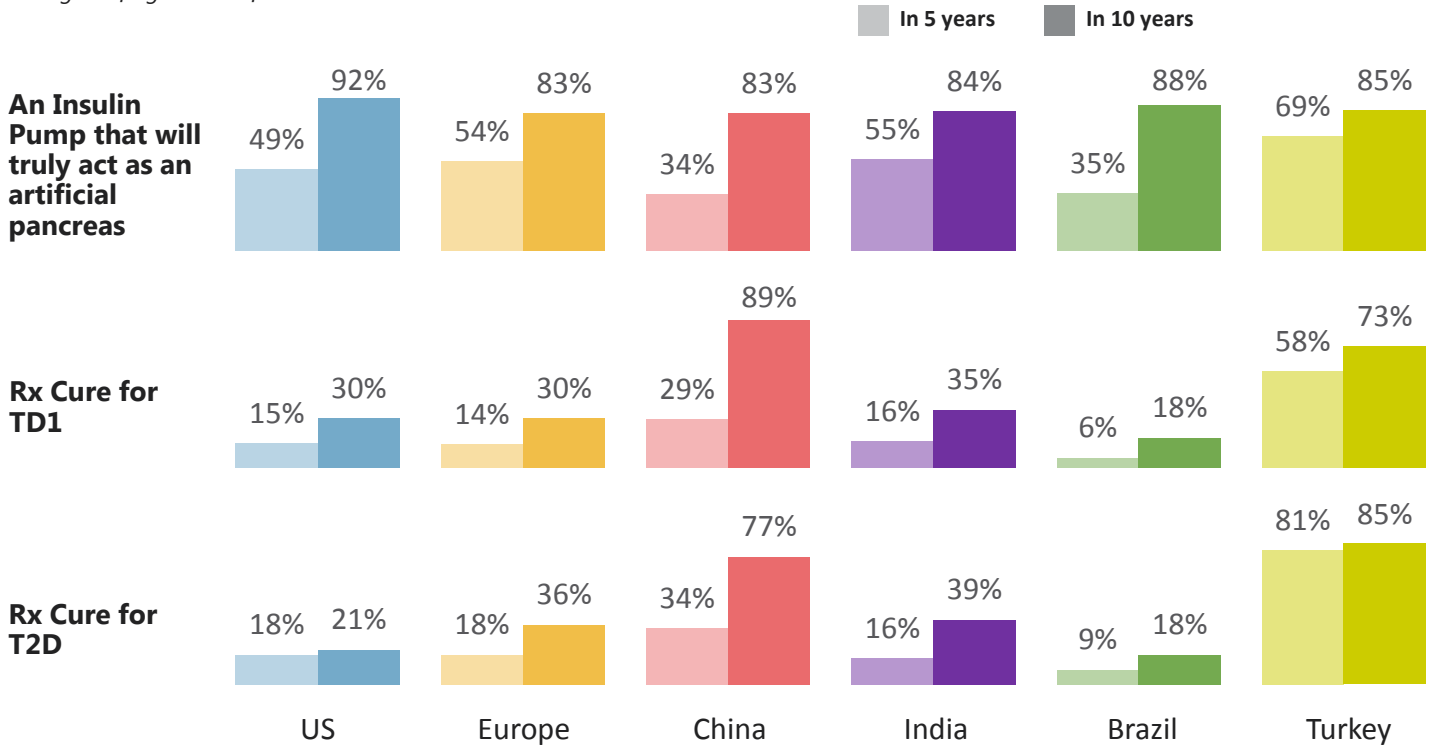
### Automated Insulin Delivery Systems (Artificial Pancreas, Closed Loop)



## What are physicians expecting in terms of device/treatment development in the next 10 years?

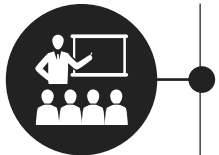
In all markets, the vast majority of physicians agree that the Insulin Pump will evolve to become a true artificial pancreas within the next 10 years. In China and Turkey, a majority of physicians also believe that there will be a pharmaceutical cure developed for Diabetes 1 & 2 in the relatively near future.

Showing % of agreement for each market



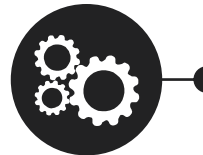
## What additional support should blood glucose monitoring device manufacturers provide to physicians?

Open-ended question – higher mentions shown



### Training for staff/patient support

- Provide educational resources for professionals
- Logistical/technical support
- Patient information materials
- Hotline/24-7 support



### Better system integration

- Full integration with smart devices
- Simplified and universal wireless meter downloading systems
- Monitoring data in real time



### New technology development

- Device development (i.e. smart insulin pen)
- Automatic analysis of patient data/Artificial Intelligence to support clinical decisions



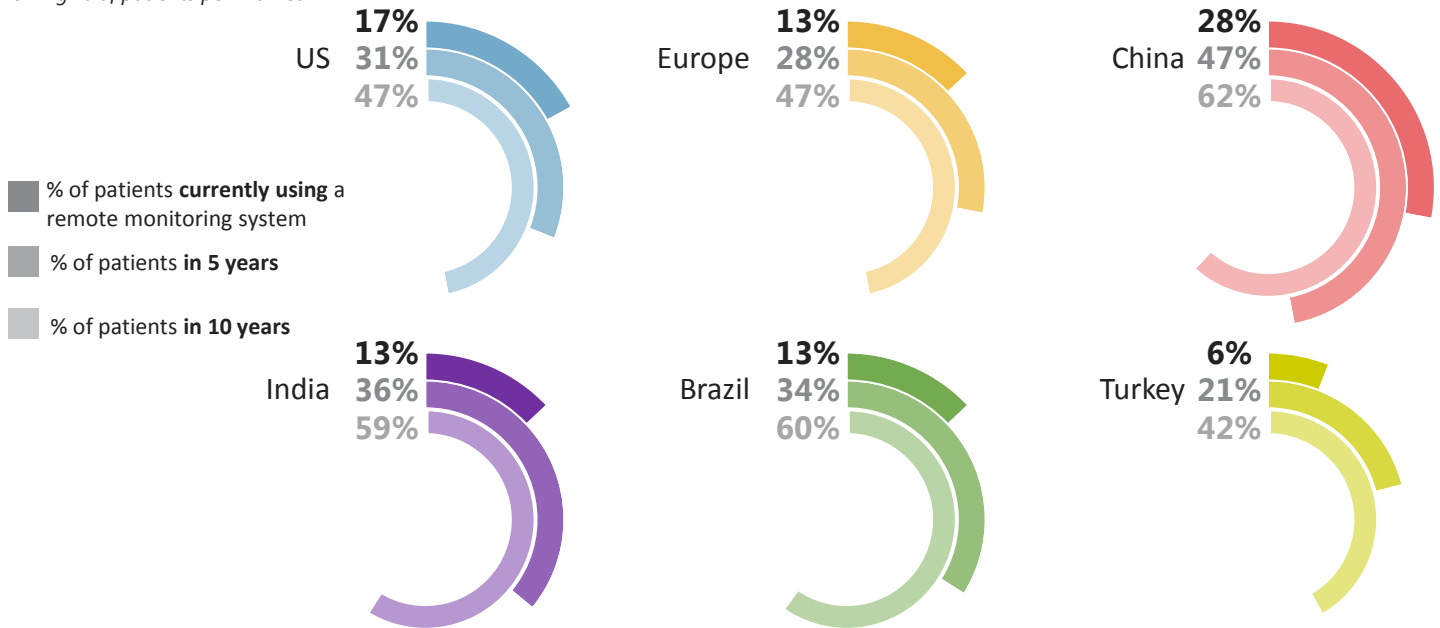
### Costs/funding (especially in US)

- Financial support
- Free samples
- Support with insurance coverage

## How many patients are currently using a remote monitoring system? How do physicians expect this number to evolve in the future?

Physicians in China believe that, in 5 years, almost half of their patients will be using a remote monitoring system and that, in 10 years, this figure will be more than 6 in 10. Physicians in India and Brazil, despite low current usage in these countries, are expecting to see a big shift in adoption in the next 10 years. Physicians in US, EU and Turkey, however, are more conservative, being of the opinion that less than half of their patients will be using a remote monitoring system in 2028.

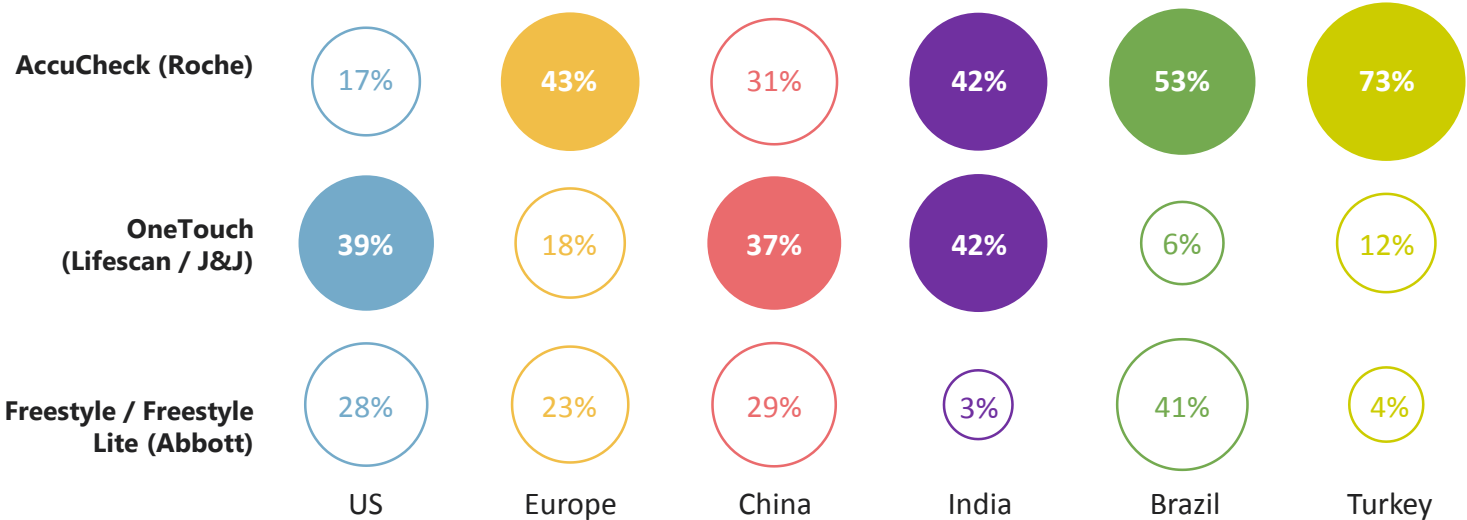
Showing % of patients per market



## Which are the most recommended Blood Glucose Meter brands?

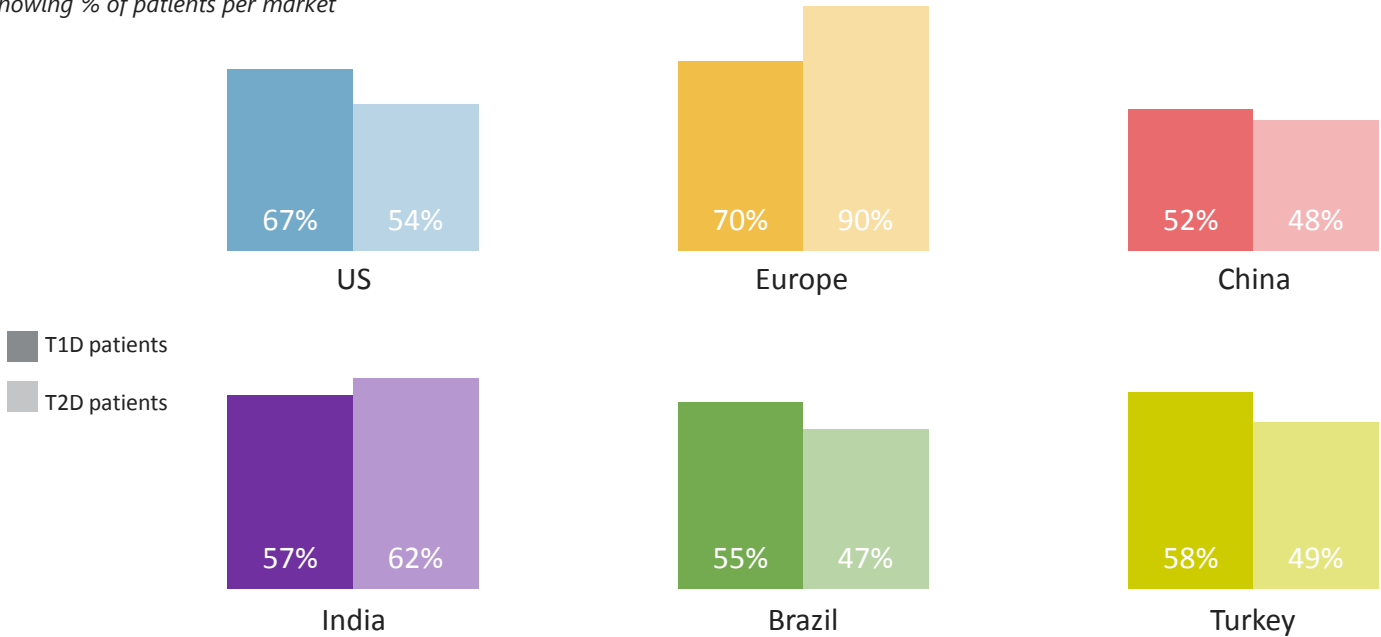
AccuCheck is the most recommended Blood Glucose Meter brand in Brazil, Turkey and Europe (except in Spain, where Abbott leads). In US and China, OneTouch is the leading brand. In India, OneTouch and AccuCheck are equally recommended.

Showing % of physicians per market – top 3 brands ranked by total level order



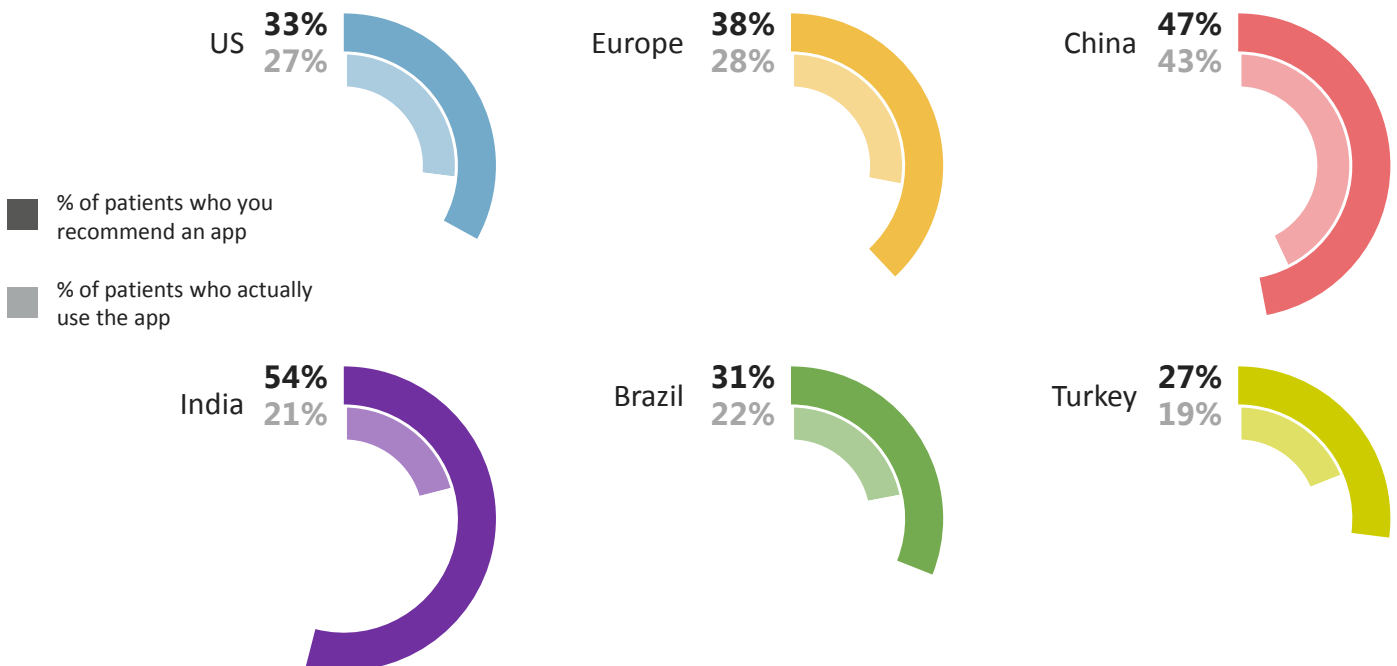
## To what extent do patients follow the correct regime for blood glucose testing/monitoring?

According to physicians, a higher proportion of diabetic patients in Europe follow the correct regime for blood glucose testing/monitoring. This proportion is lower in China, India, Brazil, Turkey and for T2D patients in US. Showing % of patients per market



## Apps for monitoring blood glucose data: intent vs. use

Physicians in China and India are the most likely to recommend a patient downloads an app to help monitor their blood glucose meter data. However, while patients in China tend to follow their physicians' recommendation, adoption in India is relatively low. Showing % of patients per market

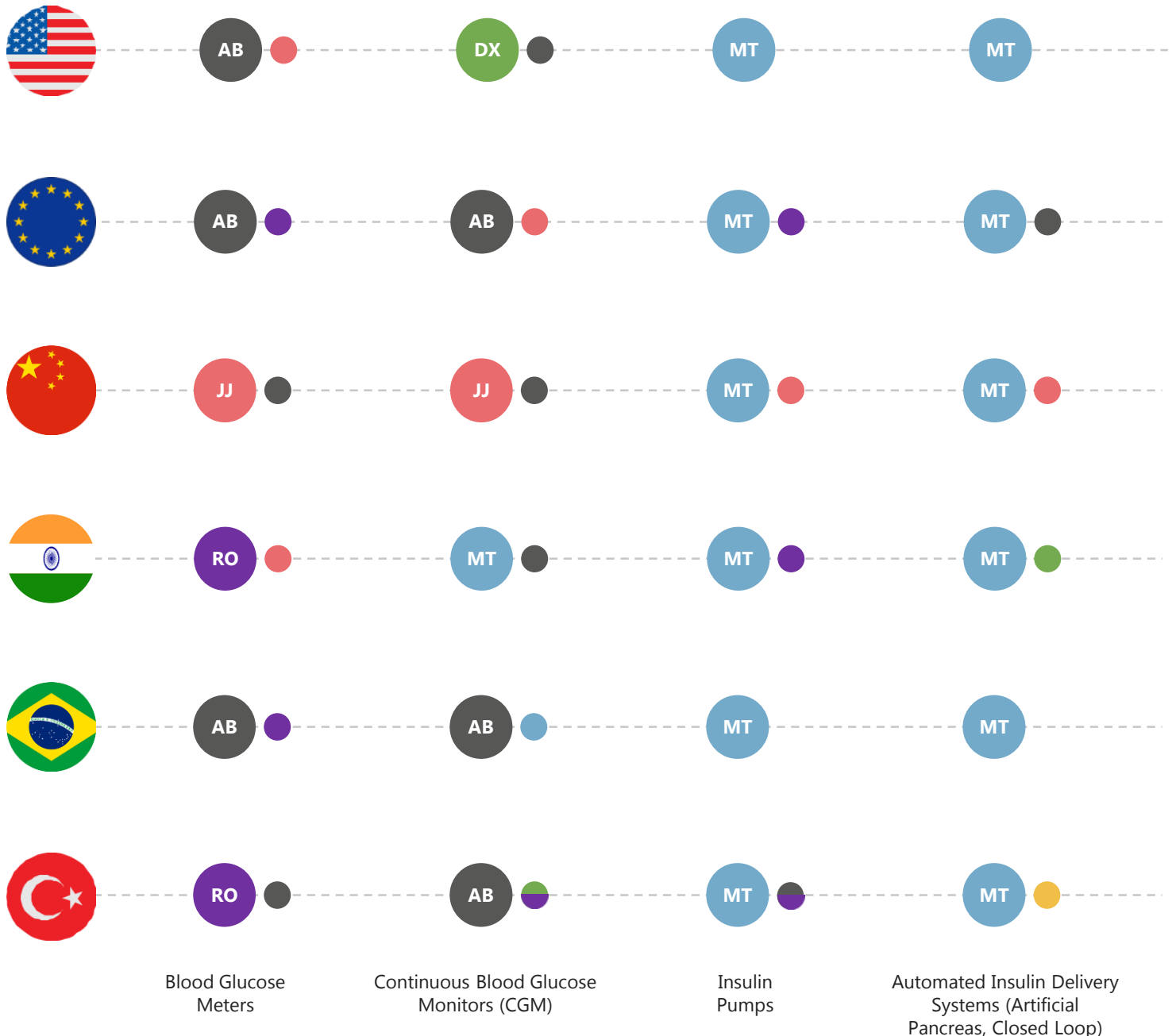




Note: Sanofi, Bayer and Animas were also included in the list

## Who is the most innovative manufacturer in Diabetes?

In all markets, Medtronic is seen as the most innovative manufacturer in Diabetes for Insulin Pumps and Automated Insulin Delivery Systems. For CGM and Blood Glucose Meters, Abbott, Roche and JJ lead.

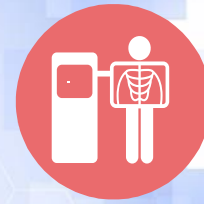


● Most innovative manufacturer  
● 2<sup>nd</sup> Most innovative manufacturer



# Ipsos MD&D Pulse Survey

## DIABETES



## How can SERMO RealTime benefit my business?

- SERMO RealTime (a digital HCP-only rapid research tool) is not intended to replace traditional quantitative surveys. However, it does provide a valuable option to gather almost instant and affordable insights in today's fast-paced environment.
- SERMO RealTime can be used for multiple purposes, but is particularly useful for:
  - Refining an upcoming study design
  - Supporting ongoing business decisions
  - Checking on brand messaging and/or visuals
  - Tracking market trends
  - Analysing general sentiment pre and post-campaign
  - Supporting a workshop discussion

## How does it work?

- Questionnaires can be scripted and launched within 24 hours, although 1-2 days should be allotted if translation is required.
- Surveys can be in field for either 24 hours, 48 hours, or 5 days based on the sample number, types of questions being asked, and the target audience. However, **76% of all pulse surveys complete in under 5 hours.**
- Questions are fielded online to a global panel of 1.8 million HCPs. This panel (managed by SERMO) encompasses 40+ specialities from 30 countries, including: US, Europe (15 markets), Mexico, Brazil, Argentina, Turkey, Russia and APAC (7 markets).
- Target lists can also be uploaded and panel matched.
- Following completion of fieldwork, raw data can be provided instantly in Excel, and PowerPoint (including analysis) within 1-3 days.
- Surveys are limited to **10 questions** with the option of 2 screener questions if needed.



## Ipsos MD&D Pulse Survey **DIABETES**



**Ipsos Healthcare**

**Ipsos Healthcare** – Ipsos Healthcare partners with pharmaceutical, bio-tech, medical device and technology organisations to inspire better healthcare.

Operating in over 40 countries, our 700+ healthcare experts support key business decisions for our clients throughout the commercial lifecycle – from early-stage strategy, through to product launch and performance optimisation. We do this through a uniquely integrated combination of therapeutic, market, analytical and commercial expertise, as well as gold standard proprietary real world evidence.



**SERMO** - A leading global social network for physicians where close to 800,000 fully verified and licensed physicians from more than 150 countries talk real-world medicine, review what peers think of different treatment options - including ratings and comments on prescription drugs - collectively solve cases, respond to healthcare polls, and earn honorarium from surveys.

In 17 years, SERMO has become the world's largest healthcare professional (HCP) polling company. The SERMO research network is comprised of 1.8 million HCPs and includes 40 percent of the U.S. physician population. Most of the 700,000 surveys SERMO conducts annually are among specialist physicians – over 70 percent of physician members are specialists.

**For more information on MD&D market research and data from this survey, please contact us at:**

[medtech@ipsos.com](mailto:medtech@ipsos.com)

**Or visit our microsite:**

[www.ipsos-medtech.com](http://www.ipsos-medtech.com)