Research approach

SAMPLE
6 top global bloggers in the diabetes space

METHODOLOGY
90-minute video-enabled online focus group
Live streamed to device manufacturers

FOCUS
Global trends in the diabetes arena and the unmet needs of People With Diabetes (PWD)
MARTINA TROMMER, GERMANY
icaneateverything.com
Started blogging in 2013 following diagnosis with T1. Martina blogs about a young adult’s life with T1, including travel, food, important and taboo topics, language and technology.

JOSEFIN PALMEN, SWEDEN
josefinpalmenpoweredbyinsulin.wordpress.com
Josefin has been blogging since 2015 on key diabetes topics and her sporting achievements. She also shares her knowledge about how to manage T1 whilst undertaking endurance sports with various groups.

CHRISS ALDRED, UK
the-grumpy-pumper.com
Diagnosed with T1 at 25, Chris firmly believes in the power of social media and how the Diabetes Online Community can help motivate and support PWD to manage their diabetes the way that they want to.

RENZA SCIBILIA, AUSTRALIA
diabetogenic.wordpress.com
Author of one of Australia’s most widely-read health blogs, Renza works in policy and advocacy at a diabetes organisation, speaking at local and international conferences on diabetes and language, value of peer support, and importance of co-design in diabetes services and activities.

ANDREA LIMBOURG, FRANCE
livingwithdandcd.com
Blogging since 2014, Andrea has developed peer support initiatives locally and online, as well as co-founding the #FrDOC tweetchat that ran weekly between 2013-2015. Andrea works in a paediatric hospital on patient empowerment programs.

STEPHEN SHAUL, US
happy-medium.net
Stephen has been writing his blog for over 6 years. He shares opinion pieces, product reviews, interviews and even recipes. Some of his writing has been syndicated at Diabetes Daily and he’s been featured on the patient community site The Mighty.
The motivation to blog

The initial incentive to blog was driven by a desire to communicate with people sharing similar experiences, and through telling their personal story, blogging also had a therapeutic benefit.

None of the bloggers set out to specifically engage with or influence manufacturers.

A PLATFORM TO TELL MY STORY

TO MAKE CONNECTIONS WITH THOSE IN A SIMILAR POSITION

“Writing was partially therapeutic… I know that I had been helped by reading other people’s stories”

TO GIVE OTHERS SOMETHING TO RELATE TO

“I started blogging because I wanted to connect to people… it was really, really selfish”
Keeping up with latest developments

The diabetes online community (DOC) is the most valued source of information for bloggers.

Whilst PWD who are not heavily engaged in the online community will rely on healthcare professionals, bloggers will not, believing HCPs are less likely to be up to speed with latest developments.

1. **DIABETES ONLINE COMMUNITY (DOC)**
   - Twitter / Facebook / Blogs
   - DiabetesMine / DiaTribe

2. **MEDICAL DEVICE MANUFACTURERS**
   - Personal contacts
   - Social media posts

3. **CLINICAL TRIAL**
   - Participation

4. **CONFERENCES**
   - Talks and workshops

5. **DIABETES ORGANISATIONS**
   - And charities

**HEALTHCARE PROFESSIONAL**

*Unlikely source*

“The healthcare center is probably the last institution to tell me about a new device”

“To be honest, they may not be as up to speed”
Involvement with medical device companies

For the majority of bloggers contact with medical device companies is at the point of product launch; there is a strong desire for earlier engagement of PWD in the product lifecycle.

“The idea, the basic need that we’re trying to address, needs to come from the community rather than the device maker”

Bloggers perceive that device companies have limited engagement with PWD prior to product launch

Device company led rather than a tailored, people-centric approach
Device companies engage with niche PWD; greater diversity required
Earlier stage engagement with PWD required to fully reflect fundamental needs of end-users

Blogger contact with medical device companies is usually at the point of product launch

Event attendance/facilitation
Product testing at launch
Product/campaign reviews
Challenges facing medical device companies

Bloggers recognise they represent a very niche group of PWD; a key challenge for medical device companies is reaching the wider, potentially less engaged and less knowledgeable population.

**BLOGGERS FEEL THAT A LARGE PROPORTION OF PWD ARE NOT WELL CONNECTED OR ARE CONSIDERED HARD TO REACH AND ENGAGE WITH.**

- Extremely reliant on HCP
- Rarely see their HCP
- In denial
- Not interested in new tech
- Affordability and accessibility issues

**HOW TO REACH THESE PWD?**

- Educational resource
- Greater rep presence
- Peer to peer learning
- Training support
- Treat people as individuals not patients #languagematters

"They are going for low hanging fruit…. There is a huge unmet need where people either don’t know, or because of cost don’t have access to devices"

"This is the recurring theme…it’s information provision, it’s educational services. How do we reach the people we’re not reaching?"
Top trend: Off label device development

Considering the most significant recent development, the DIY movement is giving PWD opportunity to improve their diabetes management now, rather than waiting for the medical device industry.

What is the DIY movement?

PWD are taking matters into their own hands by developing platforms, apps and cloud-based solutions, as well as reverse-engineering existing products in order to better utilise devices and health data for improved outcomes. One such example is the homemade artificial pancreas system (APS).

“The DIY movement has really shaken things up and forced other products to rethink the way they are doing things and speed up their processes”

#WeAreNotWaiting

<table>
<thead>
<tr>
<th>PWD</th>
<th>MEDICAL DEVICE INDUSTRY</th>
<th>MEDICAL COMMUNITY</th>
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<tbody>
<tr>
<td>EMPOWERMENT</td>
<td>PRESSURE TO INNOVATE</td>
<td>UNCERTAINTY</td>
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<tr>
<td>Sense that PWD have waited long enough</td>
<td>Industry pushed to work harder and faster</td>
<td>Some excited, others alarmed by potential risks</td>
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Global Trends and Unmet Needs

July 2018
Bloggers believe that the DIY movement poses new challenges not only for PWD, but also the medical device industry and the medical community.

#WeAreNotWaiting key challenges

- Reliance on the individual’s own expertise
- Kit accessibility
- Kit affordability
- Limited opportunity for the less tech savvy
- Pressure to speed up innovation to produce similar products
- Greater emphasis on flexibility and interoperability of devices
- More initial blue-sky thinking required, without boundaries
- Low awareness and understanding
- Fear of potential risks
- Few published studies available

"The question is the people who are less tech savvy, do they get left high and dry?"

"Look at cars, a lot of things that end up in your car start with Formula 1."

"The first time they [HCPs] even hear about this is when someone stands up in front of them and says, ‘Oh look, I've built this thing’ (...) they are on the backfoot and they don’t even understand it"
Future focus for medical device manufacturers

Bloggers believe manufacturers should be focusing on interoperability, as well as concentrating on tailored, person-centric solutions.

INTEROPERABILITY
Across all devices (pumps, CGM, BGM, MDI...)
- Ability to pick and choose products to suit individual needs
- Transfer and review data more easily

TAILORED SOLUTIONS
Personalised features and functions, to suit individuals’ needs and goals
- For example, alarms/alerts, manual vs verbal device control

EDUCATION/TRAINING
Further support for HCPs, where training PWD is concerned
- More peer education and support

MDI
Re-instate NPD focus to reflect the needs of a substantial under-served proportion of PWD
- Develop smart pens, improve accuracy and comfort

“People are starting to get a little bit frustrated by the idea that we are being dictated to as to which devices can talk to each other”

“I think the device companies need to step up when it comes to education and look at how their workforce can be better involved”
Summary insights

It’s not rocket science but...

Elements of these insights may not be new, but these bloggers influence thousands of PWD globally and CMR believes their advice is worth listening to.

Our bloggers told us that the DIY movement is core to the key themes arising from the research. Discussion highlighted not only the desire for customised solutions but also demonstrated the imaginative capabilities of PWD that should be channelled into the product development process.

Focus on person-centric solutions

- Manufacturers should apply pressure to regulatory bodies to fast track certain devices (e.g., FDA and Dexcom’s G6)
- Tailor solutions to the individual with customisable device settings and features
- Interoperability between devices will be fundamental moving forward
- Use language that shows you are thinking about the person #languagematters

CMR SAYS:

Channel the motivation and imagination of PWD during development

- Development is seen to be device company-led rather than a tailored, person-centric approach
- Devices don’t currently reflect the genuine needs of PWD; there’s a feeling device companies aren’t listening
- Earlier stage engagement with PWD is required

CMR SAYS:

Empower but don’t exclude

- The DIY movement focuses on a very niche section of the PWD community
- Market research must include greater diversity of PWD (in terms of expertise, awareness, culture, ability and engagement)
- Contact should not just be with bloggers simply because they have ‘a voice’
- Ensure investment addresses the entire population, including those on MDI therapy

CMR SAYS:

There is pressure to speed up development. The long term winners are likely to be those manufacturers willing and able to create devices that are interoperable with others and customisable to the user’s needs

Device companies need to demonstrate they are listening to a wide range of voices and ensure that opportunities aren’t missed by focussing on specific user groups

Global Trends and Unmet Needs
Themes to explore further

There is scope to expand on the key insights addressed. These additional themes can further guide future product design and marketing outputs whilst meeting the needs of PWD.

- LANGUAGE MATTERS: HOW IMPORTANT IS GETTING IT RIGHT IN MARKETING COLLATERAL?
- WHAT DOES THE DIY MOVEMENT MEAN FOR THE MEDICAL DEVICE INDUSTRY?
- HOW CAN PWD GET INVOLVED EARLIER IN THE PRODUCT LIFECYCLE?
- SHOULD AND CAN HEALTHCARE PROFESSIONALS SUPPORT THE DIY MOVEMENT?
- ARE PEOPLE ON MDI THERAPY BEING FORGOTTEN?
- HOW DO DEVICE MANUFACTURERS GET THE BEST FROM BLOGGERS WHILST RESPECTING FREEDOM OF OPINION?
Thank you for your time

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