



Optimize **Rx**

— **Addressing unmet patient and provider needs in diabetes:**

**New opportunities for pharma through digital technology**

## Introduction

Successful management of type 2 diabetes (T2D) requires a combination of access to effective medications, proper medication adherence, and patient lifestyle and behavioral modifications; these areas are compounded by patient belief structures, their treatment and healthcare experiences, and demographic factors (e.g., age, education level, income). Importantly, poor medication adherence has been well-documented as a central contributor to inadequate glycemic control and ensuing morbidity, healthcare utilization (e.g., costs of outpatient and inpatient care, costs of managing diabetic complications), and mortality.

As more digital and technology-enabled tools become available to support T2D patients throughout their treatment journey, opportunity abounds for new and innovative ways to overcome modifiable barriers to medication adherence, patient engagement, and self-care (e.g., blood sugar monitoring, foot and vision care). In this study, we surveyed 25 U.S. endocrinologists to better understand the role that patient engagement can play in promoting patient education, medication adherence, and self-care in a challenging patient population.



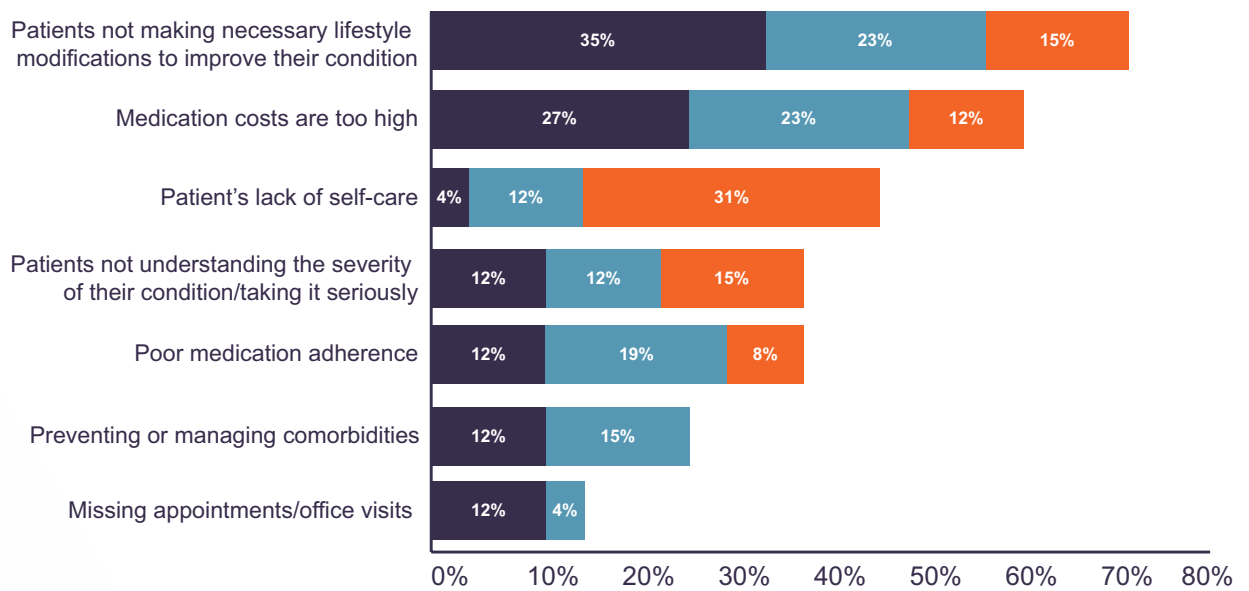
SECTION 1

# Top endocrinologist and patient challenges

**Question:**

From the list provided, please rank the top three challenges you face when trying to help your type 2 diabetes patients manage their condition.

TOP CHALLENGES



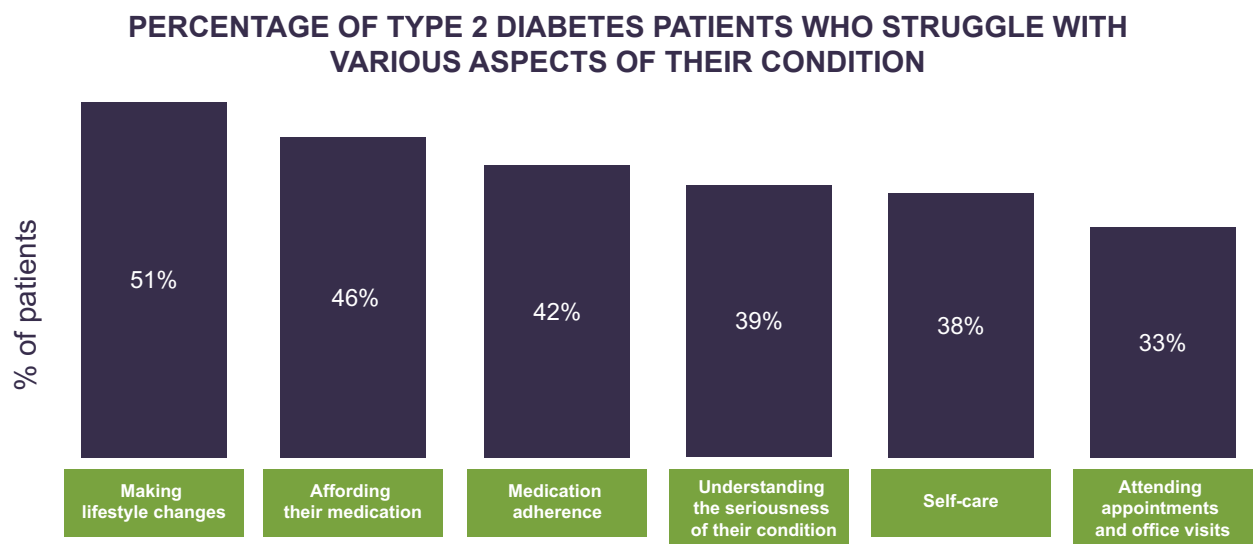
**Our Findings:**

Endocrinologists most often report that medication access (specifically medication affordability) is one of the top challenges they encounter in their management of T2D patients. Patients can face high out-of-pocket costs ranging from \$200 to more than \$600/month for branded medications. These high costs are compounded by the fact that many patients have high deductible plans or plans with limited pharmacy coverage. While there are numerous low-cost, generic treatment options, patients who would benefit from newer and/or more expensive therapies simply cannot afford these options. A patient's lifestyle also plays a significant role in managing blood glucose levels and HbA1C levels, and the ensuing range of complications (e.g., liver inflammation, neuropathy, retinopathy, kidney disease). Indeed, approximately two-thirds of endocrinologists cited the lack of T2D patients making key lifestyle changes (e.g., diet, exercise, weight loss) as one of their top challenges in treating these patients.



**Question:**

What percentage of your patients struggle with each of the following?

**Our Findings:**

Not surprisingly, the areas where T2D patients are most likely to struggle with their condition are the areas that doctors most often find challenging in managing these patients, namely lifestyle changes and medication affordability. Moreover, endocrinologists report that a large percentage of their T2D patients struggle with understanding the seriousness of their condition and taking appropriate measures (e.g., adhering to their medicines, attending office visits, self-care related to their condition) to help keep the disease under control and keep complications at bay. These data illustrate how the challenges doctors face go far beyond having safe and effective medications — they face significant hurdles in getting patients to make behavioral changes that can positively impact the trajectory of the patient's condition.

**The Opportunity**

The burden of managing their diabetes can be overwhelming for patients, but endocrinologists are limited in how much support they can provide outside of office visits. As a result, even the most motivated patients struggle with devoting the time, money, and attention needed to improve their health. Given these persistent challenges, drug manufacturers are now filling this gap in care through personalized digital support programs. From the moment a medication is first prescribed, these programs integrate seamlessly into patients' daily lives, delivering the consistent reinforcement and motivation needed to form new behaviors, while also streamlining access to financial assistance and automatically reminding patients to take or refill their medication. As a result, patients are better equipped to prioritize their health, while also more able to overcome barriers like medication cost and compliance.

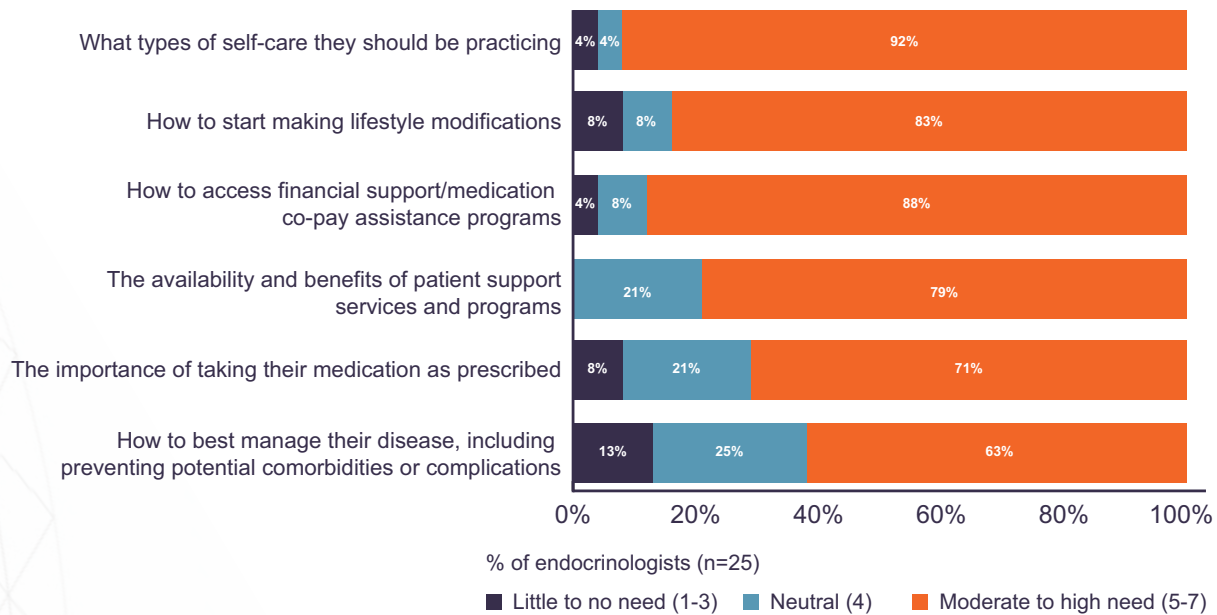
SECTION 2

# Maximizing endocrinologist and patient conversations

**Question:**

Please rate the extent to which you would like more support communicating the following to your type 2 diabetes patients. Please use a 7-point scale where 1 is no need at all and 7 is extreme need.

### ENDOCRINOLOGISTS' AREAS OF NEED FOR SUPPORTING COMMUNICATION WITH TYPE 2 DIABETES PATIENTS



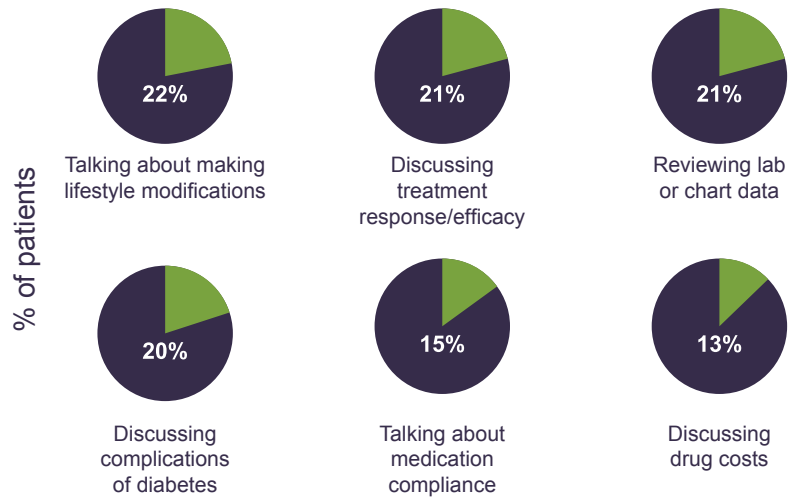
**Our Findings:**

Most endocrinologists report needing support with communicating a whole range of topics to their T2D patients, including the two most often cited challenges doctors face in treating T2D patients – medication costs and patient lifestyle changes. Beyond medication costs and lifestyle changes, topics related to patient adherence and disease management to prevent complications are ones where endocrinologists could use additional support in communicating to patients. These data highlight the many and diverse needs of endocrinologists where pharmaceutical manufacturers can support clinicians and their patients to achieve the best outcomes possible.

**Question:**

In your visits with type 2 diabetes patients, what percentage of your time would you say you spend on the following?

**HOW ENDOCRINOLOGISTS SPEND THEIR TIME DURING TYPE 2 DIABETES PATIENT VISITS**



**Our Findings:**

Endocrinologists try to cover a lot of ground in their visits with T2D patients, combining a mix of outcomes information (e.g., lab or chart data, treatment response) and educational information related to helping the patient maximize treatment (e.g., lifestyle changes, medication compliance, diabetic complications). In fact, no single area stands out in terms of capturing a disproportionate amount of the patient visit. Given that doctors try to cover so many topics in their visits with T2D patients, it is not surprising that they report needing more support communicating information to patients about their disease, medicines, and lifestyle. Interestingly, the least discussed area was drug costs, despite being one of the top challenges identified.

**The Opportunity**

Rushed or abbreviated conversations at office visits leave patients with unanswered questions or uncertainties that can compromise their commitment to treatment, while endocrinologists may be frustrated when their guidance does not correlate to changes in action. However, digital patient support programs can reduce the communication burden on endocrinologists by providing access to financial support information, educational videos, treatment FAQs, lifestyle modification tools, and biometric trackers. Digital nurse programs extend the reach of care further, allowing patients to contact a trusted health professional directly from their mobile device with questions on their medication, side effects, comorbidities, and more. As a result, patients are more informed about their disease management and endocrinologists can make better use of limited face-to-face appointment time.

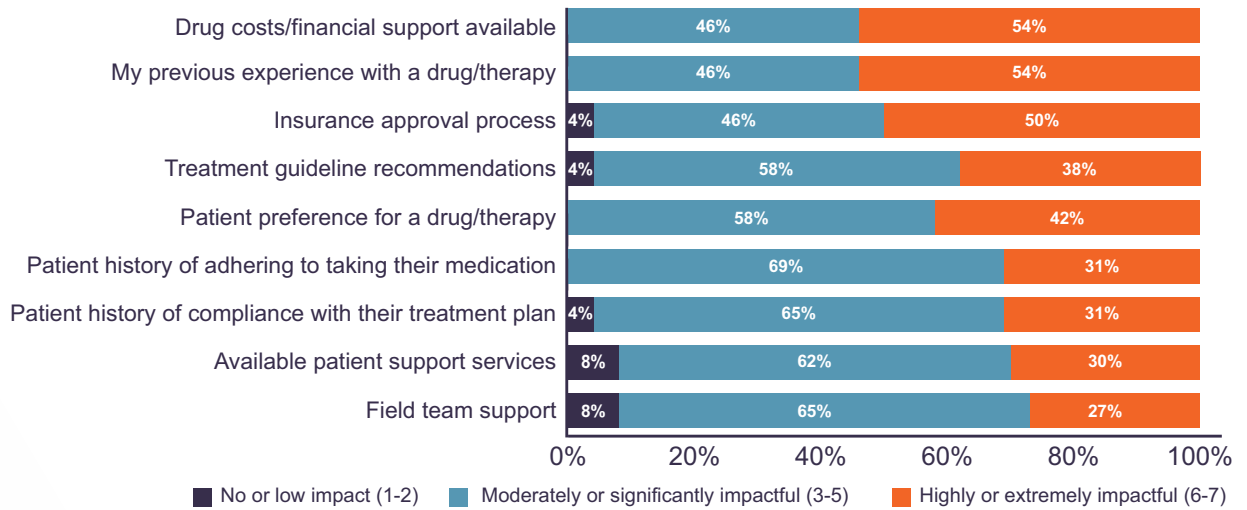
SECTION 3

# Endocrinologist treatment choices

**Question:**

To what extent do the following non-clinical attributes impact your treatment choice for type 2 diabetes patients? Please use a 7-point scale where 1 is “no impact at all” and 7 is “extremely impactful.”

### ENDOCRINOLOGISTS’ AREAS OF NEED FOR SUPPORTING COMMUNICATION WITH TYPE 2 DIABETES PATIENTS



**Our Finding:**

Medication costs, insurance approval process, and endocrinologist experience top the list of non-clinical attributes that are most often rated as highly to extremely impactful in their prescribing choices for T2D patients. In contrast, manufacturer-provided patient support programs and field team support are most commonly seen as moderately or significantly impactful on treatment decisions. These data reinforce the point made earlier in this article that medication access is a key challenge in treating T2D patients. Indeed, as the degree of clinical differentiation between T2D medications becomes narrower and more generic options become available, pharmaceutical manufacturers could face higher market access barriers.

## The Opportunity

Increasing awareness of, and access to, financial support services is critical for brand teams that want to be the therapy of choice for prescribing endocrinologists, especially where other factors like the insurance approval process are less favorable. New options like mobile co-pay cards make it easier for patients to reduce their out-of-pocket medication costs and allow prescribers to directly enroll patients via their EHR systems. Brand teams are also leveraging EHR systems to raise awareness of financial support programs among endocrinologists, so patients can be enrolled at the very start of their treatment. And while patient support programs themselves may not be a dominant factor in all cases, when properly executed they can influence other factors like patient adherence and preference, as well as endocrinologists’ overall perception of the drug.

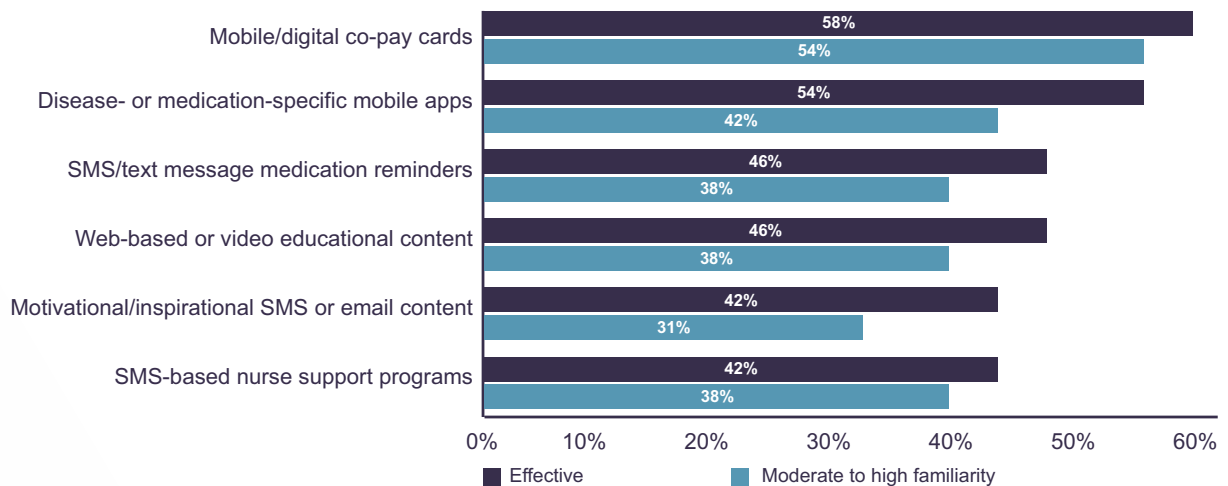
SECTION 4

# Patient adherence and engagement technologies

**Question:**

On a scale of 1 to 7, to what degree are you FAMILIAR with the following patient adherence and engagement technologies? On a scale of 1 to 7, to what degree do you find the following patient adherence and engagement technologies EFFECTIVE?

**ENDOCRINOLOGIST FAMILIARITY WITH AND EFFECTIVENESS OF VARIOUS PATIENT ADHERENCE AND ENGAGEMENT TECHNOLOGIES**



**Our Findings:**

Patient adherence and engagement technologies have added new tools to endocrinologists’ armamentarium to help patients understand their condition, be more engaged in their care and outcomes, and afford their medications; however, physician familiarity with these tools is not widespread. Among the six types of technologies included in this study, mobile/digital co-pay cards are most often cited as both familiar and effective tools. Only 31%-42% of surveyed endocrinologists report moderate to high familiarity with text/ SMS-based messages and mobile application support options; however, substantial percentages of these endocrinologists believe they are effective resources for patients.

## The Opportunity

Savvy brand teams are already using new digital technologies to make a positive impact on patient health outcomes in T2D, but there remains ample scope to increase awareness and adoption of mobile tools. The strongest programs combine tactics to directly address the multiple challenges patients face in managing their disease — reducing the cost of medication, adhering to treatment, and committing to lifestyle modifications or self-care — while also relieving the burden on endocrinologists to be the sole source of guidance and education.



## About OptimizeRx

**OptimizeRx** is a pioneering digital health company that provides healthcare communications solutions for life sciences to engage in streamlined, outcomes-focused dialogue with healthcare providers and patients. Connecting more than half of the healthcare providers in the U.S. through a proprietary electronic health network, the OptimizeRx digital health and communications platform is a SaaS solution supporting treatment access and adherence by advancing affordability and transparency. The platform unlocks novel patient and provider touchpoints for life sciences along the complete longitudinal patient journey, from both ambulatory and hospital point-of-care, to retail pharmacy, through patient engagement outside the care setting.



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