

MEDICAL CONDITIONS WITH NEW PRODUCT NEEDS

A comparison of US vs. Japan through a
large-scale physician survey (PatientsMap)



By utilizing a large-scale physician survey called

PatientsMap (2014 version),

Social Survey Research Information Co., Ltd. (SSRI), M3, Inc. and M3 Global Research announce the comparative results of the top 15 medical conditions in which physicians feel the need for new pharmacological products.

"PatientsMap" was launched, in Japan, as a database product in 2009, and it uncovers the number of patients treated by over 20,000 Japanese physicians in over 400 disease conditions. In addition, to the number of patients, it also uncovers new product needs (i.e. medical conditions in which physicians feel a need for new pharmacological products).

This "PatientsMap" study was launched in the US, the largest pharmaceutical market in the world, in 2012 with 6,000 US physicians, and the survey is being conducted periodically.

This comparative analysis of "new product needs" uses the 2014 data from all respondents who have participated in the survey from the US and Japan.

According to the survey, "obesity" ranked first in the US. 27.4% of US physicians mentioned this as a medical condition in which they wish for new products. "Dementia" came first for Japan, with 14.5% of physicians mentioning it.

IN THE US, THE FOLLOWING MEDICAL CONDITIONS RANKED AS THE TOP 5:

1. Obesity – 27.4%
2. Depression/Depressive State – 23.7%
3. Diabetes – 22.1%
4. Dementia – 20.5%
5. Migraine – 19.5%

IN JAPAN, THE FOLLOWING MEDICAL CONDITIONS RANKED AS THE TOP 5:

1. Dementia – 14.5%
2. Seasonal Allergic Rhinitis – 10.1%
3. Sepsis – 9.5%
4. Perennial Allergic Rhinitis – 8.8%
5. Diabetes – 8.4%

This result reflects the current issues that both countries are facing with obesity becoming a national epidemic in the US, and measures for dementia becoming a social problem in Japan.

The overall percentages for the need of new products tended to be higher for the US physicians, which may suggest that US physicians feel more need for new products.

For other trends, in the US, psychiatric disorders such as "depression" and "anxiety" ranked higher compared to Japan. Conditions such as "gastric cancer," "seasonal allergic rhinitis," "perennial allergic rhinitis" and "atopic dermatitis," which have higher prevalence in Japan, all ranked within the top 15 conditions in Japan, but none in the US.

This analysis of medical conditions with new product needs is based on answers from all of the respondents. However, when viewed by individual specialties, the needs for new products were generally higher for rare diseases and/or cancers within their respective area of specialty. We are planning to conduct further comparative analysis on this aspect in the future.

AFTER ITS LAUNCH IN 2009, PATIENTSMAP IS CURRENTLY USED BY MORE THAN 20 PHARMACEUTICAL COMPANIES.

Comparison of rankings between the US and Japan

Medical conditions that physicians feel a need for new pharmacological products

n=6,175

US

Ranking	Medical Condition	Feel a Need for New Products	% of Respondents Treating This Condition (for reference)
1	Obesity	27.4%	52.1%
2	Depression/ Depressive State	23.7%	51.1%
3	Diabetes	22.1%	51.6%
4	Dementia	20.5%	33.9%
5	Migraine	19.5%	47.6%
6	Anxiety Disorder	18.8%	46.5%
7	Hypertension	17.8%	54.1%
8	COPD	16.0%	38.5%
9	Lower Back Pain	15.7%	47.6%
10	Dyslipidemia	15.6%	44.0%
11	Osteoarthritis	15.1%	36.7%
12	Fibromyalgia	14.8%	31.0%
13	Headache	14.8%	49.8%
14	GERD/NERD	14.3%	55.6%
15	Diabetic Neuropathy	13.9%	34.8%

n=20,288

Japan

Ranking	Medical Condition	Feel a Need for New Products	% of Respondents Treating This Condition (for reference)
1	Dementia	14.5%	33.3%
2	Seasonal Allergic Rhinitis/Hay Fever	10.1%	43.0%
3	Sepsis	9.5%	22.6%
4	Perennial Allergic Rhinitis	8.8%	33.2%
5	Diabetes	8.4%	57.2%
6	Depression/ Depressive State	8.2%	31.2%
7	Hypoalbuminemia	7.7%	23.8%
8	Atopic Dermatitis	7.6%	23.7%
9	COPD	7.5%	33.7%
10	Gastric Cancer	7.1%	18.3%
11	Hypertension	7.1%	61.6%
12	Schizophrenia	6.6%	15.0%
13	Bronchial Asthma	6.5%	41.9%
14	DIC	6.2%	14.5%
15	Interstitial Pneumonia	6.1%	15.1%

PatientsMap 2014
US Version

The respondents of this study were randomly selected per specialty/department from a physician panel of 100,000 owned by M3 Global Research (US).

STUDIED MEDICAL CONDITIONS:

400 x general medical conditions and
12 x conditions for vaccination

SAMPLE SOURCE:

M3 Global Research online physician panel

SAMPLE DEPARTMENT:

All departments in hospitals and clinics

METHODOLOGY:

Online survey

SAMPLE SIZE:

Total of 6,175 physicians

FIELDWORK SCHEDULE:

End of December 2013 — End of February 2014

CONTENTS OF THE SURVEY:

- Medical conditions that they treat
- Number of patients they see per medical condition
- Medical conditions in which they wish for new products
- Sales rep visitation status

PatientsMap 2014
Japan Version

The respondents of this study were randomly selected per specialty/department from members of m3.com, a portal site for healthcare professionals with 240,000 online members.

STUDIED MEDICAL CONDITIONS:

411 x general medical conditions and
22 x conditions for vaccination

SAMPLE SOURCE:

M3 Global Research online physician panel

SAMPLE DEPARTMENT:

All departments in hospitals and clinics

METHODOLOGY:

Online survey

SAMPLE SIZE:

Total of 20,288 physicians

FIELDWORK SCHEDULE:

End of June 2014 — Early September 2014

CONTENTS OF THE SURVEY:

- Medical conditions that they treat
- Number of patients they see per medical condition
- Medical conditions in which they wish for new products
- Sales rep visitation status

This service is provided jointly by Social Survey Research Co., Ltd. (SSRI), M3, Inc. and M3 Global Research.

SOCIAL SURVEY RESEARCH INFORMATION CO., LTD. (SSRI)

ESTABLISHED April 1982

CAPITAL 27 million yen

EXECUTIVE President & CEO Takashi Makita

STAFF 110 staff members

ADDRESS **Headquarters Office**
Idemitsu Nishi Shinjuku Bldg.
5-1-14 Nishi Shinjuku, Shinjuku-ku,
Tokyo 160-0023
JAPAN

Osaka Office
Tetsutani Bldg. 502
2-2-2 Tokui-cho, Chuo-ku,
Osaka540-0025
JAPAN

**AFFILIATE
COMPANIES** PD Research Co., Ltd.
SSRI-CHINA Co., Ltd.

URL <http://www.ssri.com/index.html>



Tel: 03-3370-3474
Email: hdennoh@ssri.com | csakai@ssri.com

M3, INC.

ESTABLISHED September 2000

CAPITAL 14 billion and 98 million yen

EXECUTIVE Representative Director Itaru Tanimura

STAFF 274 staff members

ADDRESS Akasaka Intercity 10th floor
1-11-44 Akasaka
Minato-ku,
Tokyo 107-0052
JAPAN

SUBSIDIARIES COMPANIES	M3 USA Corporation (United States of America)	M PLUS Corporation (Japan)
	M3 Global Research (United Kingdom)	e-SMO Inc. (Japan)
	Doctors.net.uk Limited (United Kingdom)	MIC Medical Corporation (Japan)
	Medi C&C Co., Ltd. (Korea)	C.M.S Co.Ltd. (Japan)
	Kingyee (Beijing) Co., Limited (China)	Mediscience Planning, Inc. (Japan)
	iTICKET Corporation (Japan)	M-cube, Inc. (Japan)
	Mebix, Inc. (Japan)	M3 Doctor Support Corporation (Japan)
	Clinical Porter Inc. (Japan)	M3 Marketing, Inc. (Japan)
	M3 Career, Inc. (Japan)	Integrated Development Associates (IDA) (Japan)
	Reno.Medical K.K. (Japan)	Neues Co, Ltd. (Japan)

AFFILIATE	Medical Net Communications, Inc. (Japan)	P5,Inc.(Japan)
	Honyaku Center Inc. (Japan)	

URL <http://corporate.m3.com/>



Tel: 202-293-2288 ext. 203
Email: info@usa.m3.com