

# NPS+ Type 2 Diabetes Mellitus (EU) 2016

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## Abstracts

Which brands are edging ahead of the rest in the brand satisfaction stakes?

The EU market for Type 2 Diabetes Mellitus (T2DM) drugs has plenty of contenders – but which brands are the healthiest? What are the factors inspiring brand loyalty amongst European prescribers? And what can be done to convert detractors into promoters and, ultimately, improve market share?

FirstView's NPS+ Type 2 Diabetes Mellitus report assesses brand loyalty for 12 EU T2DM treatments. Before planning your market access strategy, first find out not only how your brand is performing today, but also how it compares to its competitors in the loyalty stakes.

Interested in the European market? Click here to see the US Edition.

### Get Answers to Key Questions About T2DM Treatments

**NovoLog (insulin aspart):** Detractors are actively promoting at least 6 other brands. Exactly who is NovoLog losing market share to and why?

**Victoza (liraglutide):** Which other single brand are Victoza Promoters also actively promoting? And what are Victoza Detractors suggesting instead?

**Tresiba (insulin degludec):** Promoters are clear on the brand messages they associate with Tresiba. Could Passives and Detractors be converted by the same messaging?

**Toujeo (insulin glargine):** With more Passives than any other brand, clearly some messages are not hitting home. What could nudge Toujeo Passives into

## becoming Promoters?

Jardiance (empagliflozin): Which important Jardiance message is clearly resonating in the EU but not hitting home in the US?

Trulicity (dulaglutide): There is one competing brand that 9/10 Trulicity Promoters also commonly favour. What is it?

Januvia (sitagliptin): Market share is healthy but how much more could be gained from converting Januvia Passives or Detractors into Promoters?

Invokana (canagliflozin): Are brand messages on safety, side-effects, risk and tolerability making an impact on decision-makers? Or should more be done?

Tradjenta (linagliptin): Is Tradjenta achieving above or below average brand loyalty in the T2DM drugs category? How does it compare to competing brands?

Farxiga (dapagliflozin): Which single brand attribute is most commonly associated with Farxiga, not just for Promoters but for Passives and Detractors too?

Xultophy (insulin degludec/liraglutide): How well are key messages on safety, MOA and risk profile getting through to doctors?

Galvus (vildagliptin): Which top priority message are 2/3 Galvus Promoters recalling but only 1/3 others mentioning?

## Top Takeaways

Only two brands show strong NPS brand health scores: The remainder show average or even negative scores and third place lags 62% behind the leading brand. Where does your brand sit?

Satisfaction is generally high but loyalty is still low: Physicians are actively considering at least 5 other drugs – in some cases up to 8 others.

Clear opportunities to greatly improve current share: If Detractors can be converted into Promoters, two brands stand to gain significantly more than all

the others surveyed. Find out which ones.

One dominant message: Which single message ranked in the top three for 10/11 drugs surveyed?

### A Report Based on Expert Knowledge

We surveyed 150 Diabetologists from the EU5 (France, Italy, Germany, Spain, UK), chosen from the largest community of validated physicians in the world. The same community that pharma market researchers trust for reliable, fast intelligence.

We conducted the survey between September 5th and 12th, 2016.

### Explore Important Brand Loyalty Issues

NPS+ Type 2 Diabetes Mellitus (US) explores key issues affecting brand loyalty for T2DM drug manufacturers. You'll learn:

How satisfied the T2DM market is.

How loyal doctors are to your brand.

How many other brands your Promoters recommend.

Which other brands your Promoters and Detractors recommend.

How much market share your brand has among Promoters and Detractors.

How much market share you stand to gain by converting Detractors into Promoters.

Which messages Promoters, Passives and Detractors associate with your brand.

Your brand DNA: what doctors really think of your brand—in their own words.

### What is Net Promoter® Score?

NPS is a customer loyalty metric developed by (and a registered trademark of) Fred Reichheld, Bain & Company, and Satmetrix. It was introduced by Reichheld in his 2003 Harvard Business Review article One Number You Need to Grow.

How does NPS work?

NPS measures overall brand satisfaction and loyalty by asking one simple question:

'How likely are you to recommend this brand to a colleague?'

Responses - given on a scale of 0 (not at all likely) to 10 (extremely likely)—are used to classify respondents into 3 categories:

Detractors are those who answer 0 – 6.

Passives are those who answer 7 – 8.

Promoters are those who answer 9 - 10.

How is NPS calculated?

The percentage of detractors - the percentage of promoters = NPS.

For example, 25% Promoters, 55% Passives and 20% Detractors give you an NPS of +5.

NPS can range from -100 (everybody is a Detractor) to +100 (everybody is a Promoter). The higher the score the healthier the brand.

What is FirstView NPS+?

NPS+ turns your Net Promoter Score into actionable information by answering key questions about brand loyalty.

Each NPS+ report examines doctors' relationships with the brands used to treat a major disease area—measuring brand loyalty and showing you how it affects your market share. NPS+ also examines “brand DNA”, revealing in doctors' own words

what brands mean to them.

Instead of one simple metric, NPS+ gives you a detailed picture of brand health that highlights areas for improvement, and helps you see exactly what steps you need to take next.

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