

**Medical conditions with new product needs:  
A comparison of US vs. Japan through a large-scale physician survey (PatientsMap)  
– “Obesity” first for US, and “dementia” first for Japan –**

By utilizing a large-scale physician survey called “PatientsMap” (2014 version), Social Survey Research Information Co., Ltd, M3, Inc. and M3 Global Research announces the comparative results on 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 20,000 Japanese physicians in 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” 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 US and Japan.

According to the survey, “obesity” ranked first in the US with 27.4% of the US physicians mentioning this as a medical condition in which they wish for new products, where as “dementia” came in first for Japan with 14.5% mentions.

In the US, “depression/depressive state” ranked second with 23.7%, followed by “diabetes (22.1%)”, “dementia (20.5%)” and “migraine (19.5%)” as the top 5 medical conditions, whereas in Japan, “seasonal allergic rhinitis” ranked second with 10.1%, followed by “sepsis (9.5%)”, “perennial allergic rhinitis (8.8%)” and “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 needs for new products.

For other trends, in the US, psychiatric disorders such as “depression” and “anxiety” ranked higher compared to Japan, whereas 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 of all 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

\*Rates are calculated based on all respondents in both countries

Ranking	US n=6,175			JAPAN n=20,288		
	Medical condition	Feel a need for new products	% of respondents treating this condition (for reference)	Medical condition	Feel a need for new products	% of respondents treating this condition (for reference)
1	Obesity	27.4%	52.1%	Dementia	14.5%	33.3%
2	Depression/depressive state	23.7%	51.1%	Seasonal allergic rhinitis/ hay fever	10.1%	43.0%
3	Diabetes	22.1%	51.6%	Sepsis	9.5%	22.6%
4	Dementia	20.5%	33.9%	Perennial allergic rhinitis	8.8%	33.2%
5	Migraine	19.5%	47.6%	Diabetes	8.4%	57.2%
6	Anxiety disorder	18.8%	46.5%	Depression/depressive state	8.2%	31.2%
7	Hypertension	17.8%	54.1%	Hypoalbuminemia	7.7%	23.8%
8	COPD	16.0%	38.5%	Atopic dermatitis	7.6%	23.7%
9	Lower back pain	15.7%	47.6%	COPD	7.5%	33.7%
10	Dyslipidemia	15.6%	44.0%	Gastric cancer	7.1%	18.3%
11	Osteoarthritis	15.1%	36.7%	Hypertension	7.1%	61.6%
12	Fibromyalgia	14.8%	31.0%	Schizophrenia	6.6%	15.0%
13	Headache	14.8%	49.8%	Bronchial asthma	6.5%	41.9%
14	GERD/NERD	14.3%	55.6%	DIC	6.2%	14.5%
15	Diabetic neuropathy	13.9%	34.8%	Interstitial pneumonia	6.1%	15.1%

“PatientsMap 2014 THE US version” – Outline–

The respondents of this study was 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” – Outline–

The respondents of this study was 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., M3, Inc. and M3 Global Research.

■ **Contact Information** Social Survey Research Information Co., Ltd

TEL: 03-3370-3474

e-mail: [hdennoh@ssri.com](mailto:hdennoh@ssri.com)

[csakai@ssri.com](mailto:csakai@ssri.com)

■ Social Survey Research Information Co., Ltd

Established April 1982

Capital 27 million yen

Executive President & CEO Takashi Makita

Staff 110 staff members

Address 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, Osaka 540-0025

JAPAN

Affiliate companies PD Research Co., Ltd.

SSRI-CHINA Co., Ltd.

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

■ M3, Inc.

Established September 2000  
Capital 14 billion and 51.7 million yen  
Director Representative Director Itaru Tanimura  
Subsidiaries staff 2,270 staff members  
Address Akasaka Intercity 10th floor  
1-11-44 Akasaka  
Minato-ku, Tokyo 107-0052  
JAPAN

Subsidiaries companies

M3 THE US Corporation (United States of America)  
M3 Global Research (United Kingdom)  
Doctors.net.uk Limited (United Kingdom)  
Medi C&C Co., Ltd. (Korea)  
Kinyee (Beijing) Co., Limited (China)  
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Integrated Development Associates (IDA) (Japan)  
Neues Co, Ltd (Japan)

Affiliate

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

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