

Cystic Fibrosis (CF)

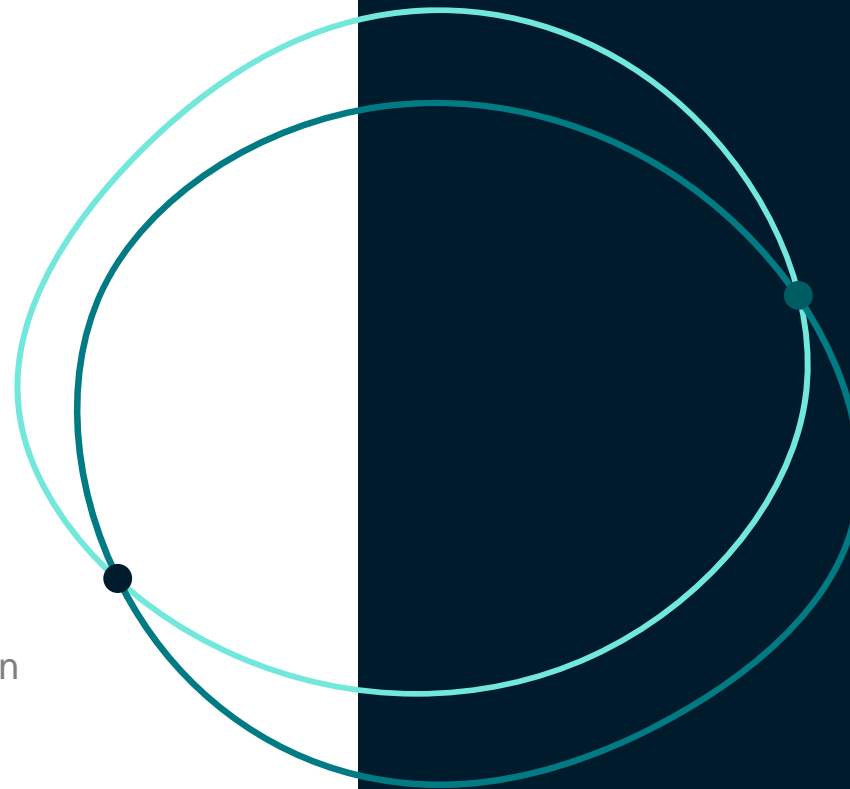
Therapy Area Report

November 2021



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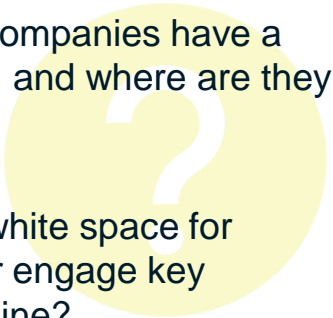
Research objectives

This report aims to support pharmaceutical companies in better understanding the CF landscape, as told through the online voice of multiple key stakeholders, providing critical insight signals of what it currently most important in this market.

This research will look to address a number of key questions relevant to this space, including:

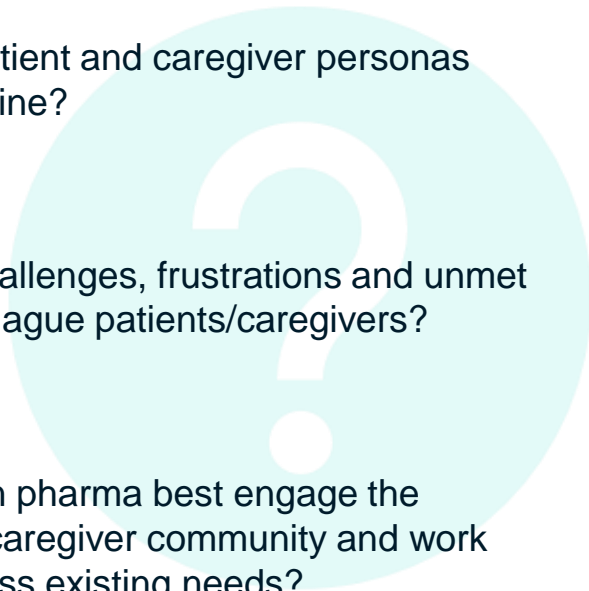


What is the size, shape and nature of the online conversation?



Which pharma companies have a presence online, and where are they most active?

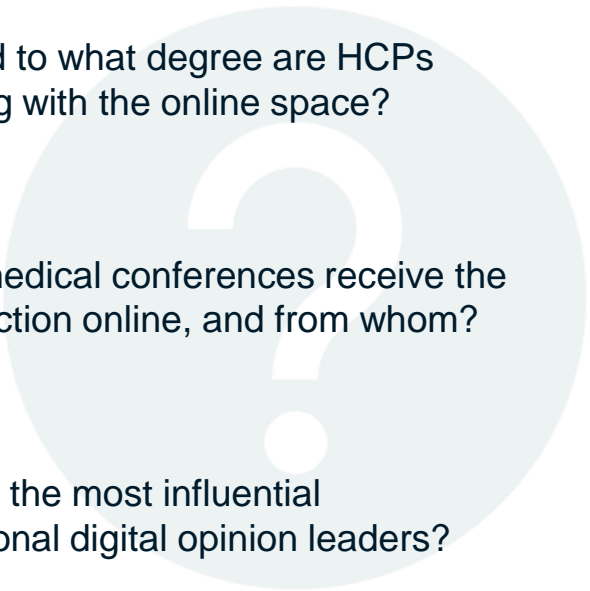
Where is there white space for pharma to better engage key stakeholders online?



What patient and caregiver personas exist online?

What challenges, frustrations and unmet needs plague patients/caregivers?

How can pharma best engage the patient/caregiver community and work to address existing needs?



How and to what degree are HCPs engaging with the online space?

Which medical conferences receive the most traction online, and from whom?

Who are the most influential professional digital opinion leaders?



I feel incredible, it feels like CF isn't in my lungs anymore. My favorite part is the ability to laugh freely again, which I couldn't do for many years

Patient, Forum, US

Patients treated with Treatment X face unexpected challenges of an unplanned future

- Parents and patients often share key milestones in their child's life, expressing gratitude that these have been reached
 - E.g. completing education, starting a family, securing a job, establishing an exercise routine
- For those treated with Treatment X, these milestones can create a sense of unease, as patients express a feeling of anxiety and fear at being unprepared for a future they weren't expecting to have
- Many didn't expect to live beyond teenage years, and express they feel they have 'lost time'
 - People express fear or regret around not being able to waiting for retirement, starting a family, or even going to college with older peers
 - Others grapple with the decision of whether to have a family, feeling unprepared for this life event with another child

Could pharma be doing more to address this novel and unique need arising from patients, as we continue to move into a new era of CF treatment?

“ I will graduate from college soon and I am looking for post-graduate jobs (terrifying) so I was wondering if anyone has retirement savings? With Treatment X in the picture I'm thinking more about my future than I ever did before but I'm not sure if it is still worth it.

Patient, Forum, US

“ Unfortunately, so many of us CF'ers feel the same about Treatment X coming! Treatment X has changed so much and now it's also changing my thoughts about the future.

Patient, Forum, US



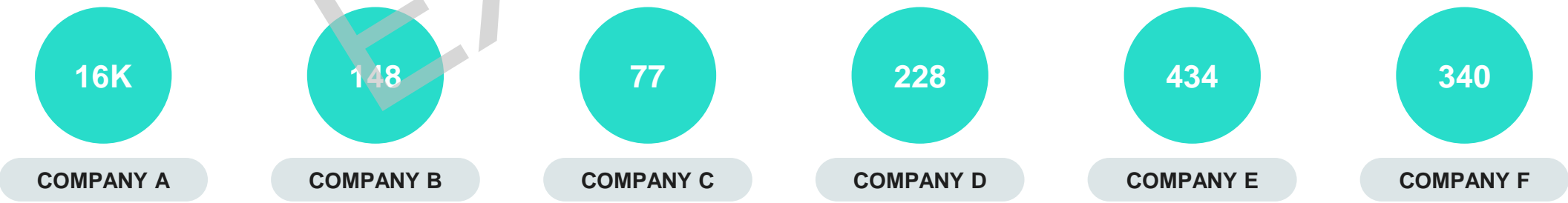
Company A has the most earned content but Company B is significantly more active on social media

Majority of key pharma companies have relatively low activity online, with little published CF content. Mentions of pharma are largely driven by access campaigns and discussions of treatment experiences

Posts published by pharma:



Posts mentioning pharma:



Company A is the most active in this space, utilizing several channels to engage audiences

Company A's posts on both Twitter and LinkedIn are largely driven by product updates, including information on clinical trials, FDA approvals and reimbursement announcements. Company A actively uses #xxx when posting any CF-related content, and actively engages with CF awareness events such as #CFAwarenessmonth.



Company A typically takes a more patient-focused approach on Instagram, frequently sharing patient stories, engaging around #CFAwarenessMonth and sharing campaigns such as xxx to demonstrate its direction and commitment in the space. Company A also uses Instagram frequently to promote CF-related fundraising activities taking place within the organization.



Company A has utilized YouTube to promote its xxx initiative, which awards scholarships to CF patients and their immediate caregivers. They also have an educational video which emphasizes their scientific and technological advancements in CF.



The main drivers of earned content for Company A on Twitter were derived from campaigns for global access to Treatment X, using hashtags such as xxx and xxx. Posts on the positive, life-changing impact of Treatment X also contributed to the earned content.

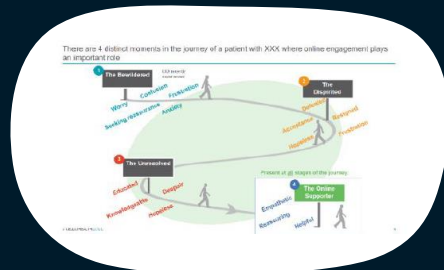


What Next?

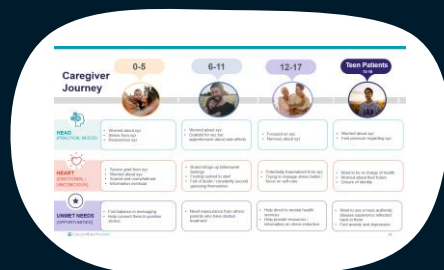
These reports are just a taster of the insights that can be gathered through social media research. Humanity are able to undertake full-scale social media research, across global markets which can provide deeper insights, including but not limited to:



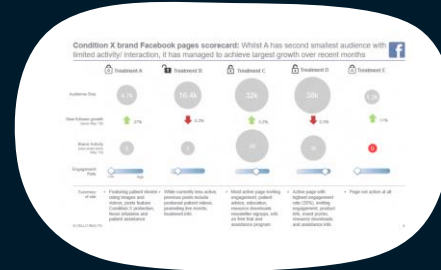
Further identifying the wider **digital influencers** shaping opinion in your therapy area, incl. nature of influence and networks, contents shared and opportunity areas



Deeper-dive and broader explorations of key **stakeholder groups** (e.g. patients, HCPs) to understand key drivers, emotions, unmet needs etc.



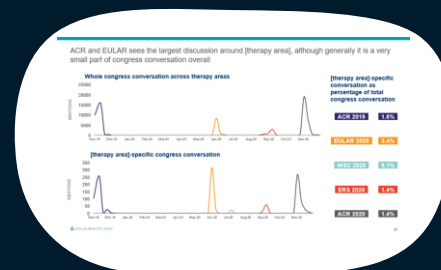
Further bringing the **patient journey** to life, incl. profiling audiences, key milestones, pain points, treatment experiences, HCP interactions etc.



Understanding further detail on **how companies are utilising social media**, what campaigns are resonating most and key messages being conveyed



Exploration of **search trends and behaviour** to understand information seeking and unearth additional unmet needs



Deep dive into **key conference discussion**, understanding most resonant topics, studies and data points being shared and discussed amongst the online audience

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Thank you