



closing the loop



## **Background**

- Penfine needles NDSS listed December 2009
- Two players dominate NDSS supply >99% market share
- Significant NDSS distribution barriers to entry for “new” players
  - no incentive for pharmacy
  - no charge to customer
  - Novo & BD on shelf free of charge (NDSS grant)
  - Low volume excludes supply via main pharmacy wholesalers
- Penfine reaches 3<sup>rd</sup> largest volume in market at 0.15% share in July 2010
- Anecdotal feedback that Diabetes Educator recommendations often not “dispensed” by NDSS
- Anecdotal feedback that patients requests via NDSS are challenged and “dispensed” alternative brand of needle
- Anecdotal feedback that patients see a clear benefit of a “click” needles



# Insulin pen needle survey July 2011

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## Method

Two separate online surveys conducted July 2011

Diabetes Educators <http://www.surveymonkey.com/s/F25HJCR>

Patients <http://www.surveymonkey.com/s/F287S96>

## Participants invited by email

453 Diabetes Educators

363 patients

## Coverage of response

NSW, VIC, QLD, SA, ACT, WA, SA

170 post codes

## Participant response

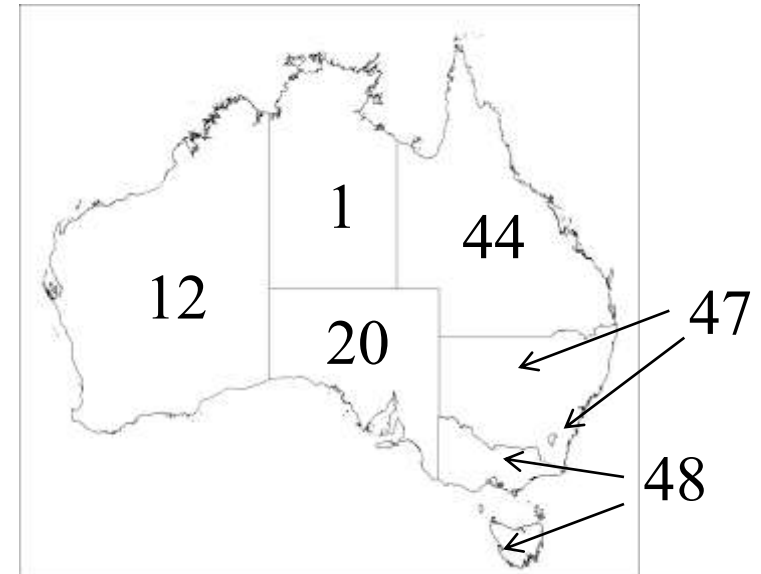
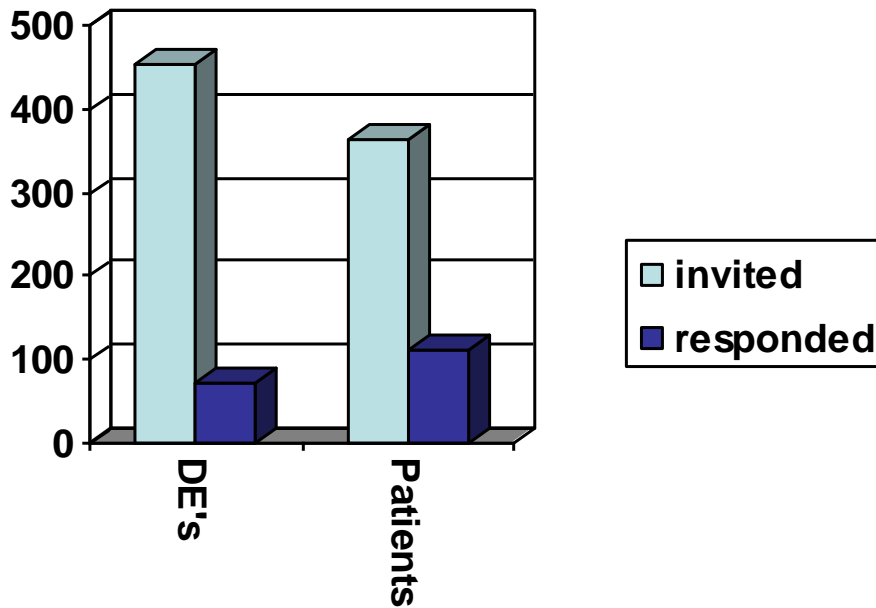
72 Diabetes Educators (16%)

111 patients (31%)

16% response DE's  
31% response patients

NSW, VIC, QLD, SA, ACT, WA, SA

177 post codes





## Observations

- There is a trend in recommending a shorter needle length by Diabetes Educators
- 8mm needle are still the preferred needle length recommended by CDE's and used by patients
- "Click" needles are growing in recommendation by CDE's and usage by patients
- Retail pharmacy (NDSS) "dispensing" significantly dilutes the recommendations made by CDE's
- Retail pharmacy (NDSS) is clearly the supplier of choice for pen needles
- Patients express faster connection and ease of use are the clear benefits for a "click" needle
- Most patients surveyed have arthritis and or sight problems
- Lack of availability of "click" needle at retail pharmacy (NDSS) and "just habit" limits usage



## Do you recommend/use pen needles?

**Comment:** all DE's and patients use or recommend pen needles

### Diabetes Educators

Do you recommend insulin pen needles?

Q 1	Educators
	n = 71
Yes	100%
No	0%

1 skipped question

### Patients

Do you use insulin pen needles?

Q 1	Patients
	n = 106
Yes	99.1%
No	0.9%

4  
skipped question



# What size needle do you mostly recommend/use?

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**Comment:** 8mm still needle length of choice despite trend toward shorter needles, NDSS pharmacy “dispensing” dilutes DE recommendations

### Diabetes Educators

What size needle do you mostly recommend?

Q 2	Diabetes Educators n = 72	NDSS May 2010	NDSS May 2011
4mm	19%	NA	3%
5mm	31%	4%	6%
6mm	47%	14%	16%
8mm	64%	75%	63%
10 mm	4%	0.02%	0.02%
12/12.5 mm	8%	11%	6%

### Patients

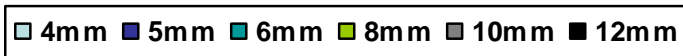
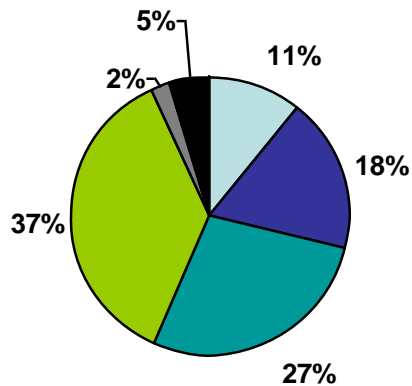
What size needle do you mostly use?

Q 2	Patients n = 111	NDSS May 2010	NDSS May 2011
4mm	14%	NA	3%
5mm	15%	4%	6%
6mm	21%	14%	16%
8mm	66%	75%	63%
10 mm	0.9%	0.02%	0.02%
12/12.5 mm	7%	11%	6%

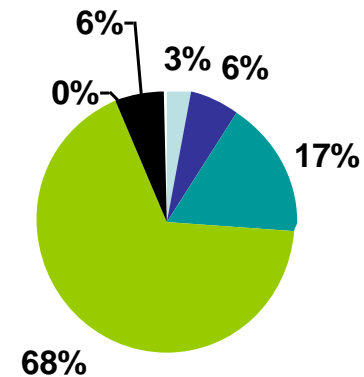
**Other;** 8mm, dependent of patient size and abdominal fat, all needles depending on patient individual needs, depends on dosage and patient preference

# Does the NDSS distribution channel support Diabetes Educator recommendations ?

**Diabetes Educators recommend**



**NDSS pharmacies “dispense”**





# What brand of needle do you mostly recommend/use ? closing the loop

**Comment:** NDSS pharmacy “dispensing” dilutes DE recommendation, particularly “click” needles

## Diabetes Educators

What brand of needle do you mostly recommend?

Q 3	Educators Recommendation n = 72	NDSS May 2010	NDSS May 2011
Novo	68%	74%	70%
BD	85%	26%	30%
Penfine click	10%	0.18%	0.1%
Braun	3%	0.04%	0.02%
Mumford	3%	0.03%	0.08%

**Additional comments:** I do not recommend by brand, Mumford needles difficult to use- “slip”, I am not aware of Penfine, no specific brand is recommended – show samples of what is available

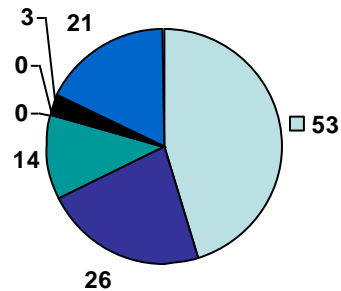
## Patients

What brand of needle do you mostly use?

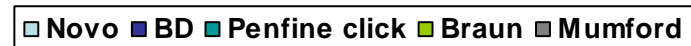
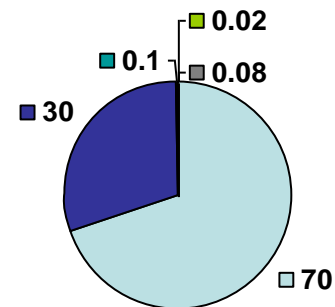
Q 3	Patients use n = 111	NDSS May 2010	NDSS May 2011
Novo	53%	74%	70%
BD	26%	26%	30%
Penfine click	14%	0.18%	0.1%
Braun	0%	0.04%	0.02%
Mumford	0%	0.03%	0.08%
Not sure	3%	NA	NA
Several brands	21%	NA	NA

## Does the NDSS distribution channel enable preferred patient choice?

What patients use



What NDSS pharmacies dispense





# Where do you get needles from?

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**Comment:** retail pharmacy is clearly the preferred point of purchase

## Diabetes Educators

Where do you suggest patients their needle from?

Q 4	Educators Recommend* n = 72
Retail pharmacy	70%
DA (free home delivery)	6%
DA (shop)	22%
Hospital pharmacy	3%

## Patients

Where do you get your needles from?

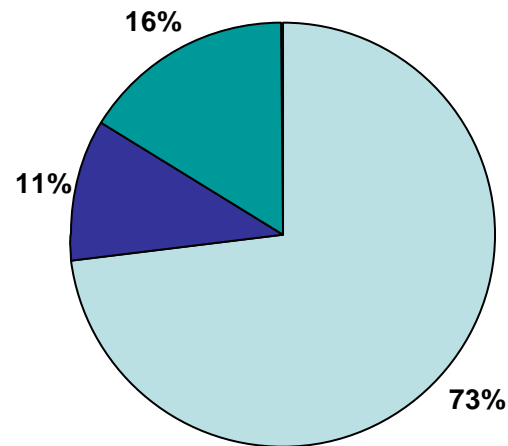
Q 4	Patients n = 105
Retail pharmacy	73%
DA (free home delivery)	11%
DA (shop)	16%

**Additional comments:** 12 educators clarified that they recommended NDSS outlets

Online survey July 2011

## Patients

Where do you get your needles from?



□ Retail pharmacy ■ DA home delivery ■ DA shop



**Comment:** majority of DE's have not recommended "click" needles whereas majority of patients have used "click" needles

**Diabetes Educators**

Have you recommended the pen needle that "clicks" onto an insulin pen?

Q 5	Educators* n = 72
Yes (go to Q6)	33%
No (go to Q7)	67%

**Patients**

Have you used the pen needle that "clicks" onto your insulin pen?

Q 5	Clients n = 110
Yes	58%
No	42%



# What did you particularly like about the “click” on needles?

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## Comment: clear benefits of “click” over screw on needles expressed by patients and CDE’s

### Diabetes Educators

What do you particularly like about the “click” on needles for your patients?

Q 6 Educators n = 37	Better than screw on	Same as screw on
Ease of use	69%	31%
More discrete	30%	70%
Faster to connect	68%	32%
Less painful	12%	88%
Security with click sound	65%	35%
Remover availability	39%	57%

Initial survey error forced some Educators to answer Q6

35 skipped this question

**Additional comments;** I made several phone calls and emails never received click on needles to sample, very disappointed, I have not seen the needles and hence can’t comment, I haven’t used them, N/A, only answered because I could not move on without answering, don’t use them but won’t let me move forward on survey without answering this question

### Patients

What do you particularly like about the “click” on needles?

Q 6 Patients n = 65	Better than screw on	Same as screw on
Ease of use	63%	32%
More discrete	39%	60%
Faster to connect	80%	16%
Less painful	33%	63%
Security with click sound	53%	45%

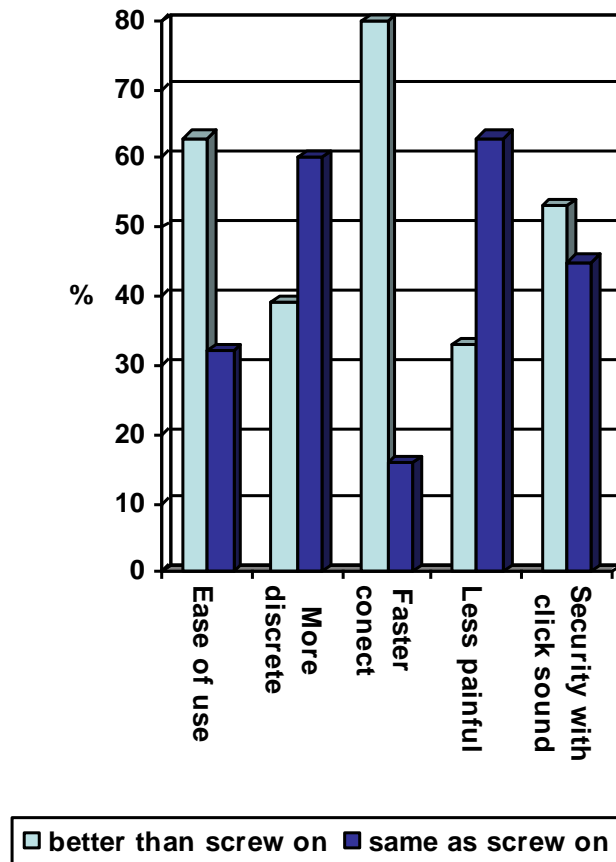
46 skipped this question

**Additional comments;** 2 stated harder to get off, 1 told not on free list, 1 stated doesn’t seem to go on right, 1 stated prefers click on to screw off



### Patients

What do you particularly like about the “click” on needles?





# Do any of the following relate to you /patients?

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**Comment:** arthritis and sight problems in majority of patients

## Diabetes Educators

Q 7 Educators n = 58	
Arthritis	41%
Sight problems	53%
Post stroke	5%

14 skipped question

**Additional comments;** 16 stated all of above, 1 stated all of above plus memory loss, 1 stated no - paediatric

## Patients

Q7 Patients n = 38	
Arthritis	46%
Sight problems	50%
Post stroke	5%

67 skipped question

**Additional comments;**

long sighted, visually impaired type 1 for 65yrs  
Losing Flexibility in hands, Nerve problems in thumb (not diabetes related), sleep apnoea, dental problems  
heart failure



**Comment:** Note just habit and lack of availability at pharmacy reason for not using “click” needles

**Diabetes Educators**

Q 8	Yes	No
Educators N=49		
Just habit	70%	30%
Could not get “click” at pharmacy	81%	19%
Don’t know	35%	65%
Patient did not like	14%	86%

23 skipped question

**Additional comments;** 7 stated not aware of alternate to screw on, 5 stated no samples, 2 stated patient preference, 1 stated they saw functional problems, 1 asked are they on NDSS free list?, 1 saw no patients with specific need for click on, 1 said as you require remover there is no advantage.

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**Patients**

Q 8	Yes	No
Patients N= 68		
Just habit	70%	30%
Could not get “click” at pharmacy	56%	44%
Dr/Diabetes Educator told me to use screw on	20%	80%

27 skipped question

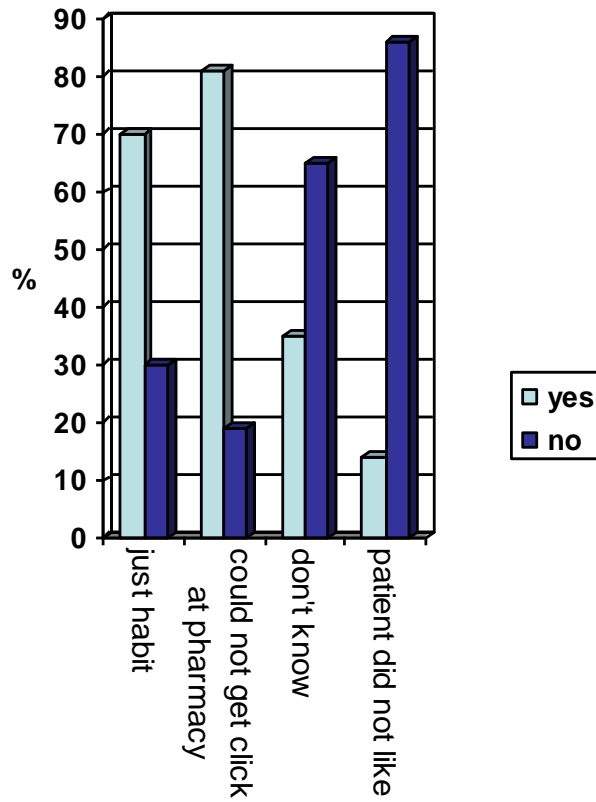
**Additional comments;**

I don't use them anymore, I believe them to be more reliable than the click needles they are secure. easier to get off, Are no problem so why change...

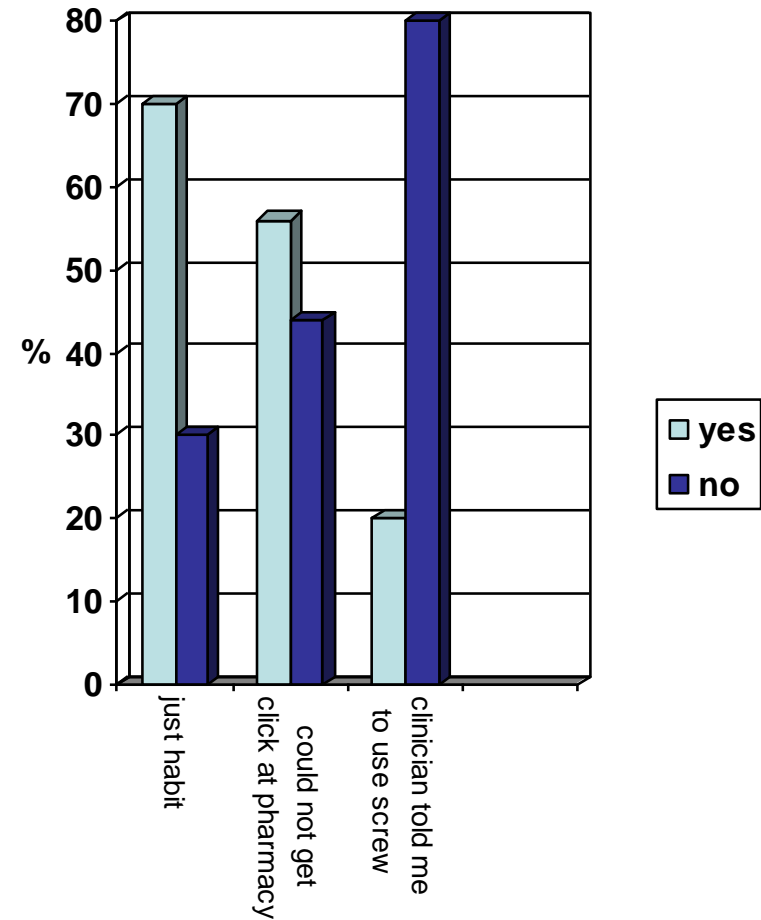
It doesn't really matter to me, they both seem the same.

Wasn't available in 4mm or 5mm, I just use what I have been given at the diabetes counter at the Pharmacy, Didn't know about them, We still have supply of screw ons, Did not find the click easy to use at all, did not find the click on as smooth I still use them, Click on were a bit funny to use, I find them easier Wasn't aware of click in needles, Had some bent needles which I could not use Less chance of inserting (into the pen) at an incorrect angle with screw-on needles

### Why DE's recommend screw on needles



### Why patients use screw on needles





## What is your state and post code?

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**Comment:** good cross section across Australia validates survey findings

Q 9	Educators n = 71	Patients n = 105
QLD	21%	29%
NSW	30%	25%
SA	9%	14%
WA	4%	9%
ACT	4%	5%
NT	0%	1%
VIC	32%	20%





## Q 10 – many Diabetes Educators made additional comments

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- Would be very happy to recommend any pen needles if they will be easier for patients to use.
- Samples to demonstrate would be good
- Insulin pen needles are a very individual item and in discussion with each pt I advise what is best for each pt.
- Had not see them so could not recommend them Don't know who makes them to order samples
- In practice, Lantus still requires min 8mm needle otherwise skin irritations and stinging, in some patients.
- I would like to have a demonstration of the click on needle
- As well as pushed on - very useful in lots of situations
- Willing to have demonstration
- I did not like question 8 and it probable did not correctly answer what you were asking.
- I do recommend screw on needles for some of my patients vision, stroke, arthritis but not all.
- I normally show my client a range of pen needles (especially if they have been on insulin for a while) so they know what is available
- A few flaws with the survey. Happy to try clip on needles - just haven't seen any
- I like the click on needle, I feel it is easier for patient to use especially if has limited dexterity, decreased strength in hands etc.
- Some patients have difficulty in unscrewing the needle (would be great if it could click off).
- The main concern is when the patient attends the pharmacy for a supply of needles they can be given the screw on needle
- Patient who is very upset, may not have taken their insulin as they did not know how to attach a screw on needle.
- The educator needs to fit the patient in (increases the workload for the educator) to re-educate on the screw on needle. (It happens!
- Beginning to use more 6mm needles, forget to consider the click on but not readily available (rurally isolated)
- May of missed education session re the pen click needles...please send click on pen needle samples
- It would be good if they clicked off instead of screw off.
- I think that having an inner cap as well as an outer cap can be confusing for some users
- I am aware of the research for shorter needles by BD and tend to make suggestions for trying other brands and sizes if no obvious reasons for worsening in BGL control occurs. Or problems with insulin sites are obvious.



## Q 10 – many Patients made additional comments

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- I sometimes find them hard to inject
- I gave a box to my friend who was restricted by stroke, he gratefully received them, and has changed to Penfine brand.
- When putting lids back on to remove they tend to come off easier
- Used them, and found that more often than not would have to change needle would be "locked" and this was far from satisfactory given
- I already have 5 injections per day - with click some days could double that.
- Where can I get new automatic pens from and what are they called thank you
- Everything has vastly improved for Diabetics over the years
- Any positive news yet with regards the Omnipod? Also do you supply any of the continuous blood glucose monitors?
- I wish there was a way to prevent them hurting when you've been using them a long time
- Thanks for the opportunity to participate.
- Less bulky, would fit in my purse better. Thanks
- Tried "click" ones but no better than BD Screw on's which are free at the local pharmacy.
- The click needles are good have asked my pharmacy to get them in stock.
- The device for disposal of Penfine tips works great
- I didn't find any benefit to the click on needle when it still needs to be screwed off
- My concern is that the one click is degenerating the screw on my Novo pen 3 as it is a plastic screw
- I also find that the one click doesn't fit on fully and I have to screw it on to make sure it is firm.
- Would love a sample never heard of them before
- Very happy with Penfine
- Why is Tasmania not represented ????
- Tried Penfine 6mm click-on's for a few months but changed to BD 4mm when they became available because they are more comfortable
- Would try a Penfine 4mm if it becomes available. Most chemists near here stock BD needles but none stock Penfine
- How can I get Free home delivery of my needles as some times I am out of stock and then I skip my dosage which is affecting me.
- Would prefer not to use needles, but have no option
- Great innovation

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