



Cancer Drug Compliance:
Pathology, Risks and Costs

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MarketVision Research | Snapshot

Founded | 1983

Industry Involvement

- Board Members: Intellus Worldwide
- Members: Insights Association, ESOMAR, Intellus Worldwide
- Regular speakers at annual market research events

Resources

Full In-House Capabilities: Data Collection, Data Consulting, Analytics, Report Writing, Moderation, Global Project Management, and Graphic Design for Impactful Deliverables



2017
AMA Gold
Top 50
Research Firm



Number of Employees | 145

Principal Locations



United States

Cincinnati	Dallas/ Ft. Worth	Los Angeles	Philadelphia
Cleveland	Indianapolis	New York City	

MarketVision's Key Verticals

- | | | |
|--------------------------|----------------------|----------------------|
| • Pharmaceutical | • Food and Beverages | • Financial |
| • Healthcare | • Retail | • Agribusiness, |
| • Consumer Package Goods | • Durables | • Travel and Leisure |

Patient Compliance | *Results from Research*



1

**Risk Compensation
and its Role in
Compliance**



2

**Impact of Rising
Oncology Medication**



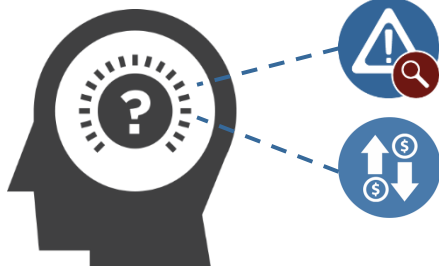
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**Implications for
Patient Outcomes**



Methodology

Objectives



1. Evaluate the role of risk aversion on patient compliance
2. Assess the impact of rising oncology treatment costs on compliance and lifestyle

Patient Profile

Cancer Patients Across Types and Stages
(n=226)

Field Dates

October 24 - November 17, 2017



Perfect Data.

****Sample Partner for
2017 R&D**



Risk Compensation



“Patients regularly don’t follow physicians orders for taking their medication because they don’t see this as a truly risky behavior...


Therefore, when costs become a major challenge, they are not averse to modifying their medication behavior because they don’t see it as being risky.”



Ranking of Risky Behaviors

Respondents were asked to rank the following list of “risky behaviors” from ‘1’ to ‘9’ with ‘1’ being the riskiest behavior

Pre-List of Risky Behaviors

Biking without a helmet	Driving while intoxicated (DWI)
Eating expired foods	Experimenting with illegal drugs
Not wearing a seat belt while in a car	 <i>Not taking prescription medication as instructed by your doctor</i>
Smoking Cigarettes	Unprotected sex with strangers
Sky Diving	

Perception of Risky Behaviors

Patients perceive 'not taking prescription medications as instructed by your doctor' as slightly less risky than 'smoking cigarettes' along the spectrum of risky behaviors.

Mean Summary

(1=riskiest, 9=least risky):



3.32	Driving while intoxicated
3.67	Experimenting with Illegal Drugs
4.22	Having unprotected sex with a stranger
4.34	Smoking cigarettes
4.83	Not taking prescription medication as instructed
5.54	Not wearing a seat belt
5.87	Skydiving
6.29	Biking without a helmet
6.93	Eating expired foods



Rising Oncology Medication Costs

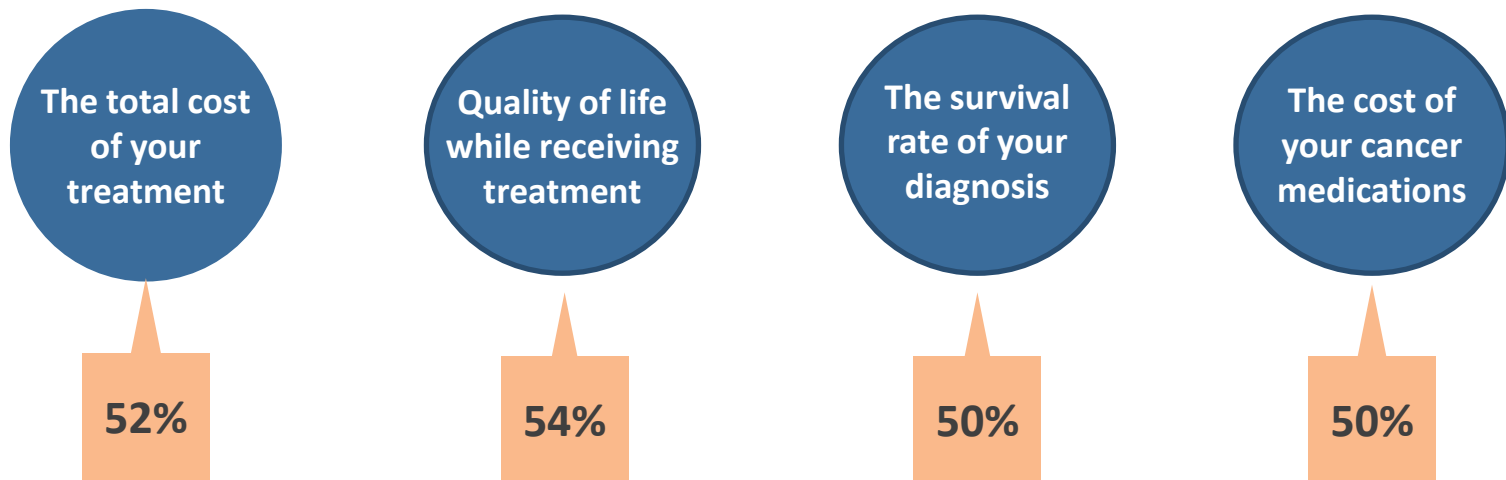


“Financial toxicity associated with increasing costs of medication and treatment are impacting patient outcomes. As patients make tradeoffs to both lifestyle and care, oftentimes the result is less compliant behavior to recommended treatment plans.”



Reaction to Diagnosis | *Concerns are High for Both Costs and Care*

Half of all patients indicated being **extremely concerned** for their **cost of treatment**, **quality of life**, **survival rate**, and **cost of medication**.



"What treatment, would insurance cover it, and quality of life during and afterwards"

Base: Total Respondents (n=226)

*Rated on a 7 point scale 1= Not at all concerned, 7= Extremely concerned.

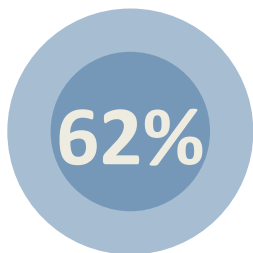
Q.14 How would you rate your level of concern with each of the following aspects of your cancer treatment?

Impact of Rising Medication Costs

In total, **62% believe cost of medication is unmanageable** or ridiculous and needs to be addressed/controlled. Those under 35 estimate a significantly higher percentage of their costs go to paying for just their medications.

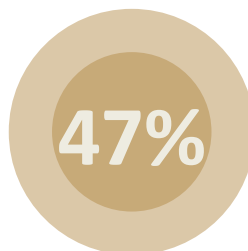
Opinions on Costs of Medications

Total

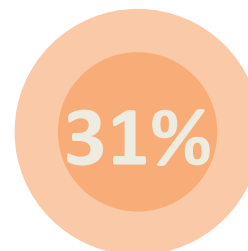


Estimates of medication costs as percentage of total treatment costs

Age: 34 or less



Age: 35-64



Age: 65+



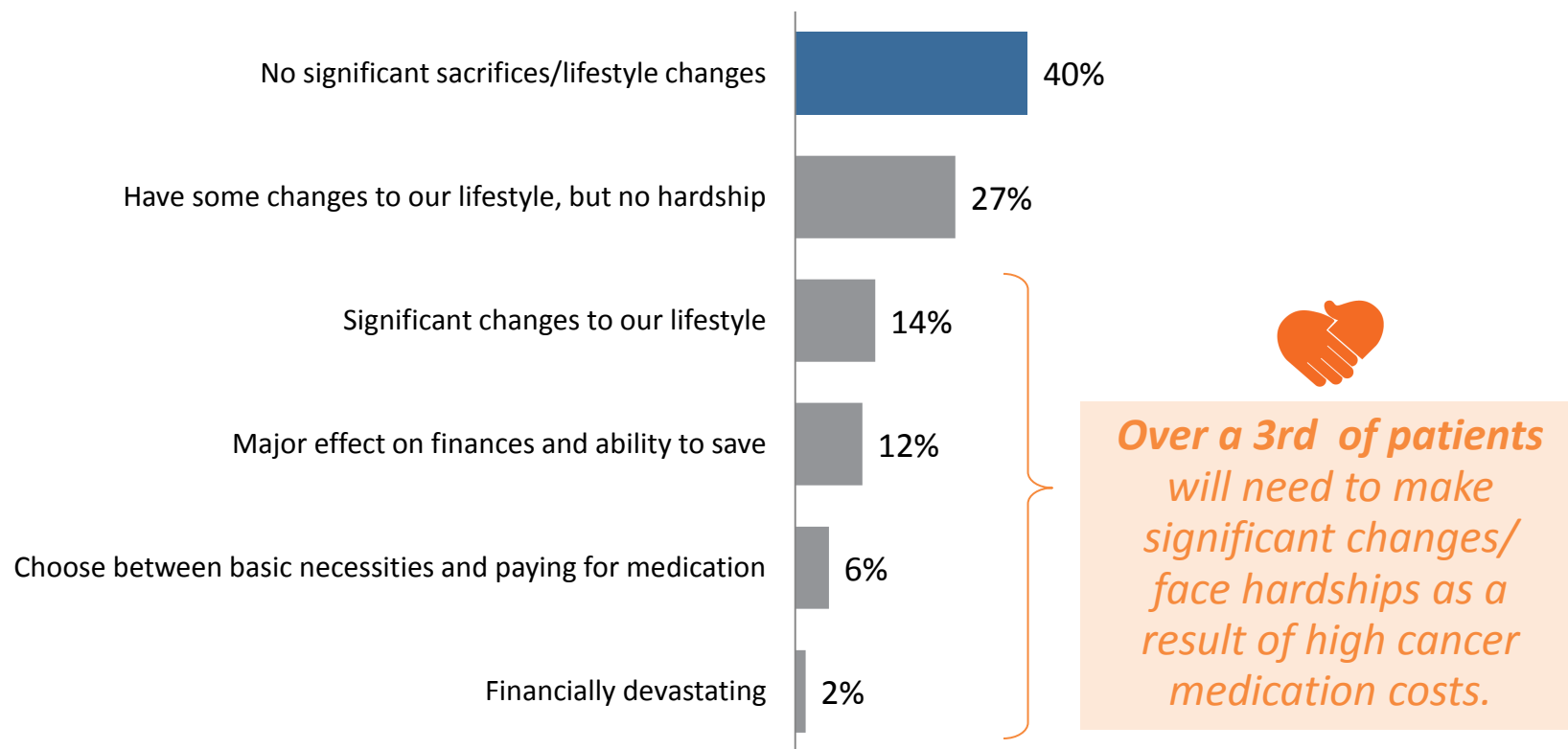
"The most difficult decision I had to make was the taking on of a second job"

Base: Total Respondents (n=226), 34 or Less (n=74), 35-64 (n=113), 65 or Over (n=39)

Q.16 To begin, when thinking about all of the costs associated with the treatment and management of your cancer diagnosis, what percentage of the costs incurred would you estimate go to paying for your medications (as opposed to covering doctor visit, co-pays, and expenses related to diagnostic tests, such as X-rays, CT scans, surgery or radiation)? Q.17 Which of the following statements best describes your overall opinion of the cost of your medications?

Impact of Rising Treatment Costs | *Hardships and Lifestyle Changes for Many*

Most patients indicate the cost of cancer medication has or will effect at least one aspect of their lifestyle, with 34% experiencing significant changes to their lifestyle.

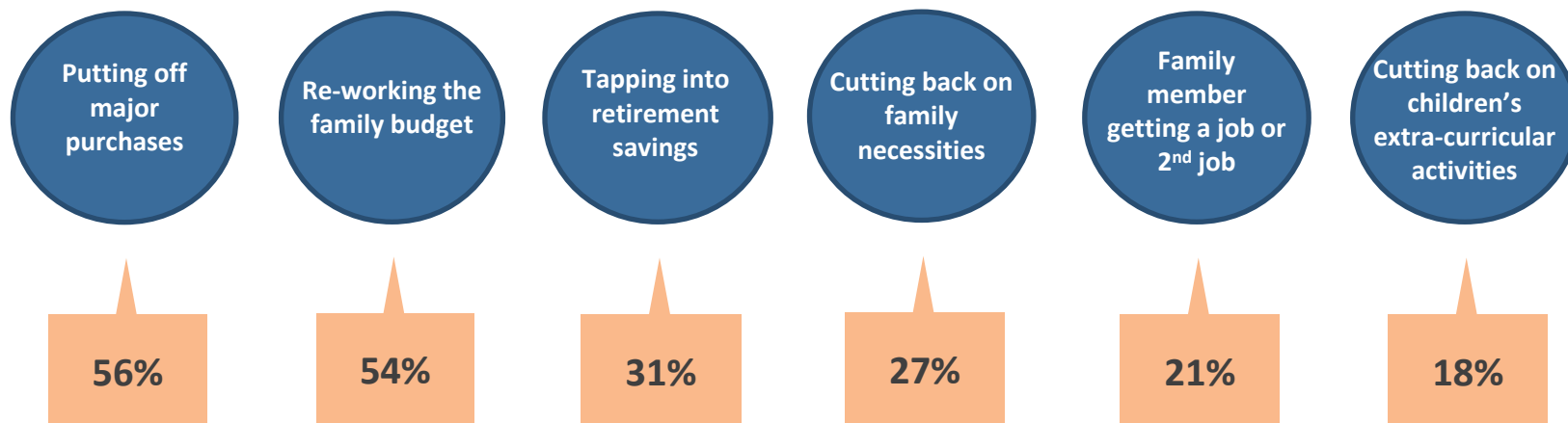


Base: Total Respondents (n=226)

Q.23 Which of the following statements best describes the impact the costs of your cancer medications have had or will have on your personal financial situation?

Lifestyle Adjustments | *Medication Costs are Forcing changes*

Medication costs have forced lifestyle changes. Among those claiming changes to lifestyle, one in four patients either have or anticipate cutting back on family necessities.



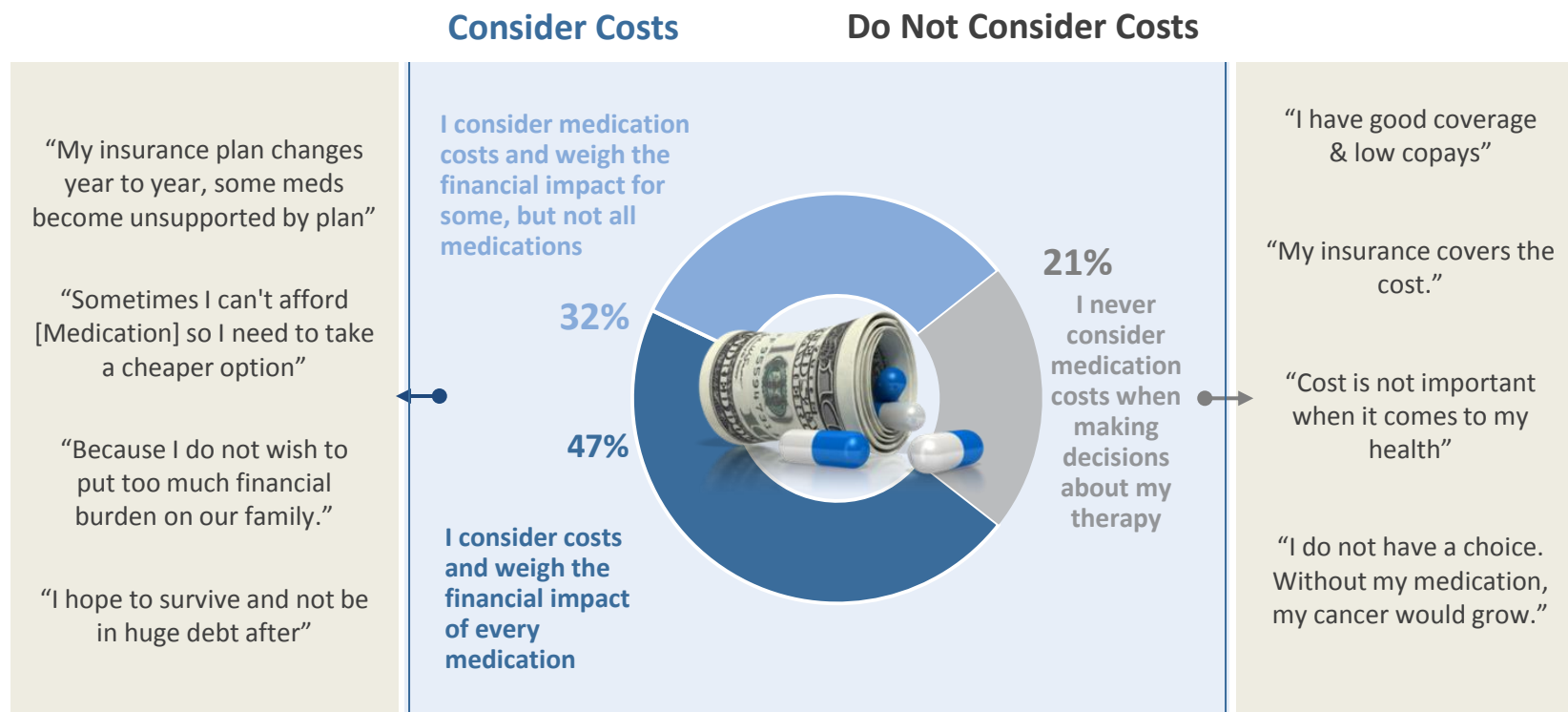
"My family has had to go without things that I feel like they need and should have so that I can afford my medications and treatment."

Base: Costs Of Medication Have Resulted In Lifestyle Changes (n=136)

Q.24 Which of the following lifestyle changes, if any, have you had to make or do you anticipate making because of the cost of your medication?

Out of Pocket Consideration | *Weighing the Impact*

Eighty percent of patients consider the cost of medication and weigh the financial impact.



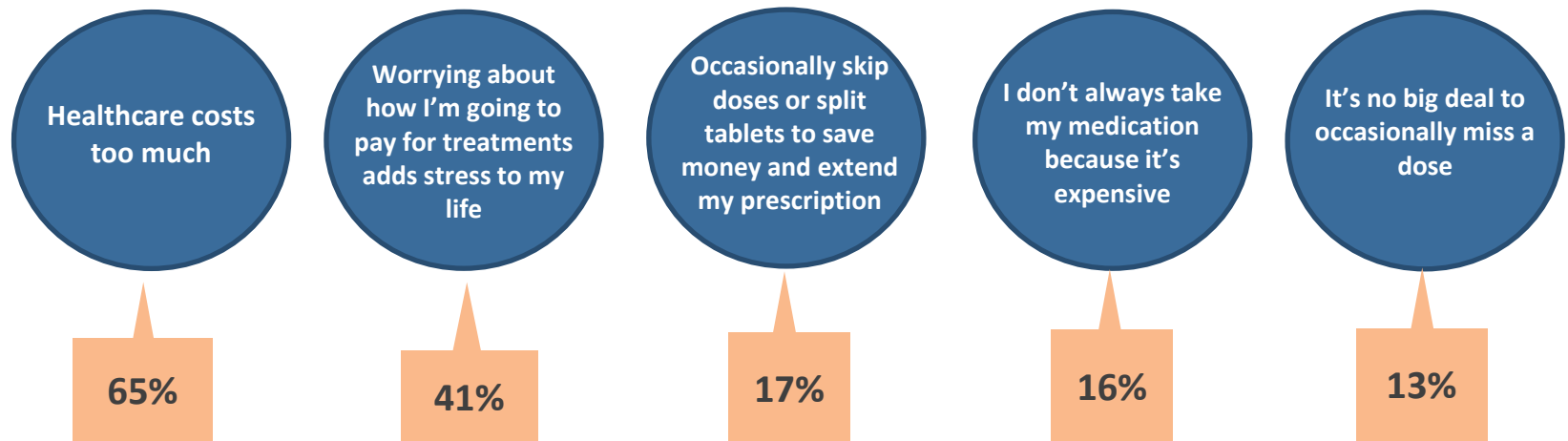
Base: Total Respondents (n=226).

Q.19 How often do you consider out-of-pocket medication costs when making treatment and therapy decisions? Q.20 You said that you consider medication costs when making decisions about your therapy. Why is that? Q.21 You said that you never consider medication costs when making decisions about your therapy. Why is that?

Agreement with Statements | *Costs and Compliant Behaviors*

Two-thirds of patients believe Healthcare costs too much, and close to half either strongly agree or are neutral with the statement “it’s no big deal to occasionally miss a dose.”

Agreement Level With . . .



"I worry about sacrificing my family's financial position for my health."

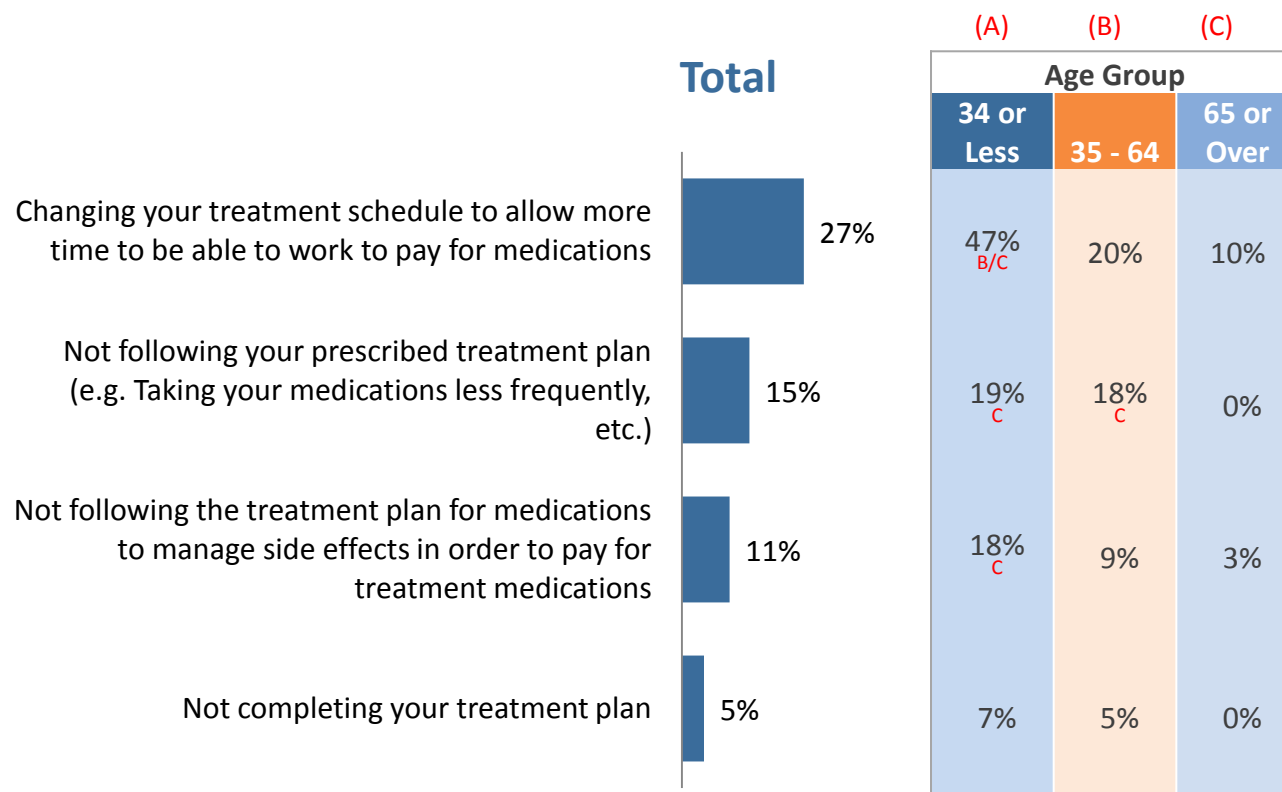
Base: Total Respondents (n=226).

*Rated on a 7 point scale 1= Strongly Disagree, 7= Strongly Agree.

Q.27 Now, please select your level of agreement with each of the following statements.

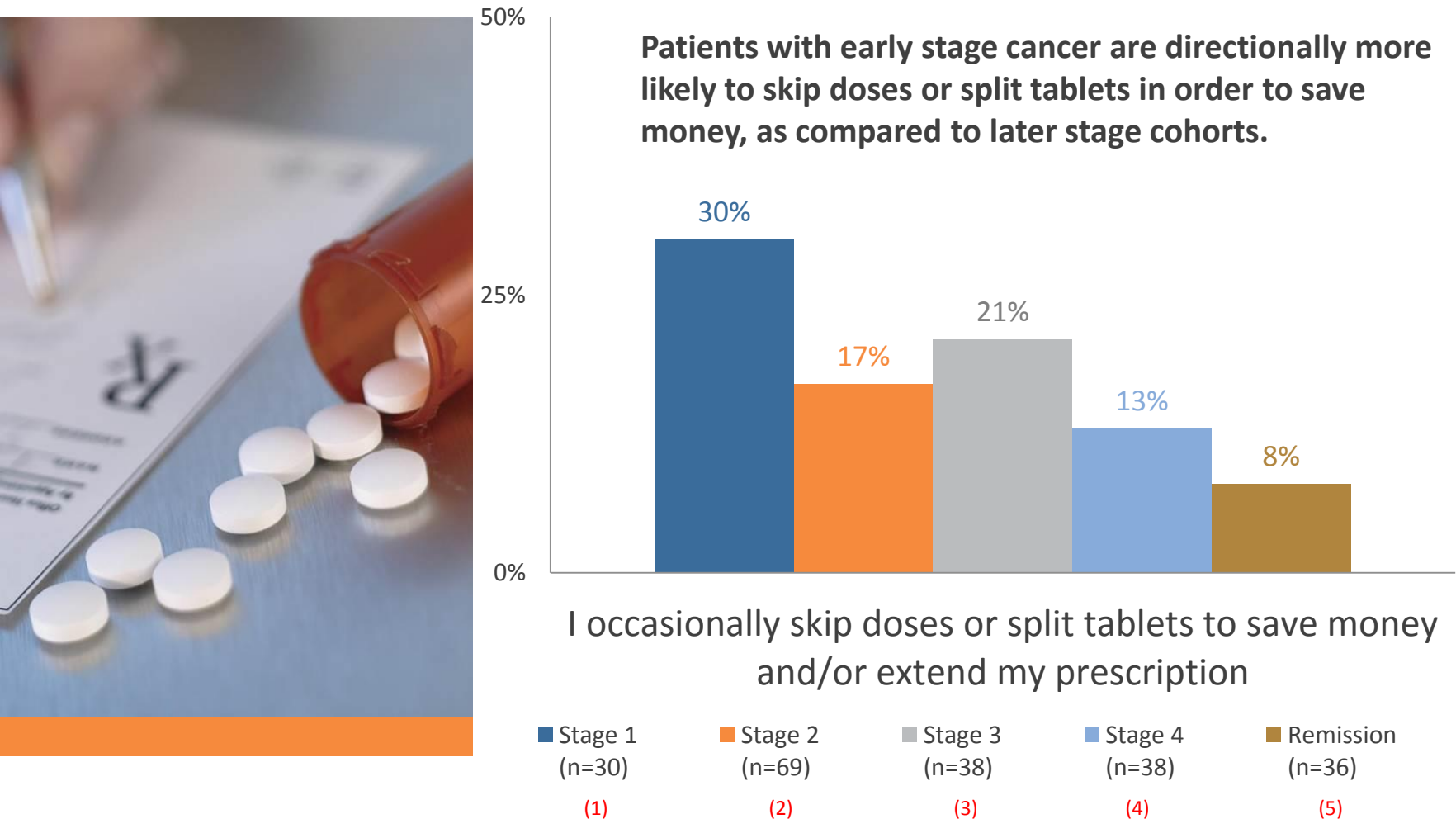
Rising Oncology Medication Costs and the Impact on Patients

Nearly half of patients make changes to their treatment regimens in order to help manage costs. Patients 34 years or younger are more likely than older groups to exhibit non-compliant behavior in order to manage costs.



Base: Total Respondents (n=226), 34 or Less (n=74), 35-64 (n=113), 65 or Over (n=39). A/B/C Indicates a significant difference between age groups at a 95% confidence level.
Q.22 Which of the following changes to your treatment, if any, have you made to help manage the costs of your cancer medication?

Non-Compliance | *Early or late stage may impact behavior*



Base: Total Respondents (n=see chart)

*7 point scale 1=Strongly Disagree, 7=Strongly Agree

Q.27_6 Now, please select your level of agreement with each of the following statements.

Wrapping Up

Costs are high and drive behavior change



For oncology patients, cost has become a major concern and has forced >50% of patients to make changes that impact their lives and the lives of their families in order to treat their disease.

Non-compliance not perceived as terribly risky



Skipping or reducing medications is not perceived as terribly risky and patients are willing to take that risk.

Even oncology patients, across all stages of disease, do not believe that non-compliance is all that risky and are prepared to modify their treatment regimens in order to address the burden of cost.

Questions?



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