



SANOFI 

Leger
THE RESEARCH INTELLIGENCE GROUP

**Cancer Patient and Caregiver
Experience Survey**

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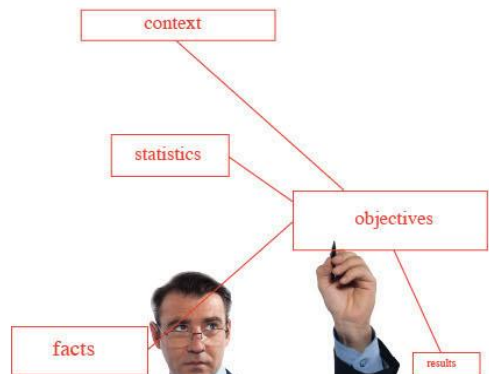
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CONTEXT AND OBJECTIVES





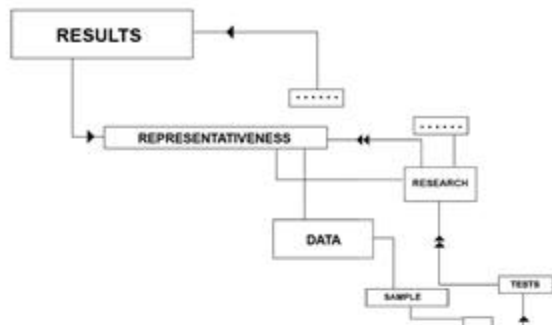
CONTEXT AND OBJECTIVES

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The objective of this study is to investigate the experiences of both cancer patients and their caregivers with regards to access to coverage, treatment, information, and supplemental support.

The survey will determine:

- How patients and caregivers navigate both the public and private benefits systems;
- How decisions around care are made, including sources of information and their influence;
- Interest in out-of-hospital care, from home care to alternative health treatments to private clinics to patient support groups;
- The already-established relationship between patients/caregivers and pharmaceutical companies, including awareness and reputation.



RESEARCH METHODS



RESEARCH METHODS

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INSTRUMENT

A survey of 502 Canadians who have cancer, have had cancer in the past, are currently caregivers to someone with cancer, OR have been a caregiver in the past was completed online between May 9 to May 18, 2013 using Leger Marketing's online panel, **LegerWeb**.

A probability sample of the same size would yield a margin of error of +/- 4.4%, 19 times out of 20.

ONLINE PANEL

Leger Marketing's online panel has approximately 460,000 members nationally – with between 10,000 and 20,000 new members added each month, and has a retention rate of 90%.

Panel members are randomly selected to receive email invitations to the individual surveys.

We ensure the protection of privacy via the usage of unique URLs and respondent IDs in combination with survey IDs.

QUALITY CONTROL

Stringent quality assurance measures allow Leger Marketing to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.





STRATEGIC CONCLUSIONS

9

Patient and caregiver responses capture different cancer journeys

Significant differences emerged between the patient sample and the caregiver sample. We have identified some possible explanations:

- Understandably, the patient sample was composed of those survived their battle with cancer; we were unable to survey those who did not, and so their experiences were not recorded. Those who survived may be likely to look back on their experiences more positively, and gloss over frustrations or struggles.
- The caregiver sample captures individuals who cared for cancer patients who passed away, as well as those who survived or are currently struggling. Those patients may have had more rare or complex forms of the disease, which resulted in a different, potentially more frustrating healthcare experience.
- Caregivers are more likely than patients to be on the frontlines of acquiring and managing treatment and care – they may have a more in-depth experience with both public and private coverage, and may even have shielded their dependents from the worst of it, contributing to the difference in perceptions this survey captured.



STRATEGIC CONCLUSIONS

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Patients and caregivers don't see eye-to-eye on the treatment experience

The above factors are most apparent when asking patients and caregivers to rate their experience with healthcare providers like their provincial government or their private insurance. Patients gave higher ratings than caregivers across the board, praising access, affordability, and timeliness significantly more than caregivers, who report having more difficulty obtaining benefits. Caregivers also report having to travel out-of-province for treatment more than patients did – although this may be due to the caregiver sample capturing more difficult (or terminal) cases.

The most striking finding with relation to the patient/caregiver disparity is who they consider to be most helpful when it comes to patient decision-making. Two thirds of caregivers say they are the ones helping their dependent make care choices, yet 86% of patients say it is their doctor or oncologist who is most influential. There is clearly a gap in communication between patients and caregivers, or a misunderstanding of who is ultimately making treatment decisions.



STRATEGIC CONCLUSIONS

11

Caregivers struggle with mental health issues, but are not interested in informal support groups

Caregivers are also more likely to have difficulty finding flexible employment options, and emotional or psychological support. Many caregivers noted that it is not just their lifestyle, finances, or outlook that is affected by cancer – they struggle with mental health issues, too. While caregivers emphasize how important their role is, and how grateful it has made them for life and health, they also describe it as “emotionally draining”, “depressing”, and “stressful”. Patients are, understandably, more likely to focus on the physical changes to their quality of life.

What patients and caregivers do agree on is the importance of assistance programs, either within the formal healthcare structure (i.e. at hospitals and cancer clinics) or outside of it (through volunteer or advocacy organizations). Many respondents called out specific hospitals for excellent care and support, and a significant number identified the Canadian Cancer Society and the Volunteer Order of Nurses as being essential to their care and recovery.

However, few patients or caregivers have sought out patient/caregiver support groups. Fifty-five percent of patients are not interested in them, and only 20% report ever having attended such a group. Caregivers are less likely to be wholly uninterested but, again, only 19% have ever attended one. Those who are not interested say it is because they have enough support from family and friends or are fine on their own.



STRATEGIC CONCLUSIONS

12

Patients and caregivers are wary about paying out-of-pocket

There is some interest in alternative health products and services, especially among caregivers. Both patients and caregivers seem willing to pay for services if they see them as supplementary – their treatment needs are being met through public healthcare, and they are seeking out options that complement, rather than replace, their current care. The example of a service that connects you to an oncology nurse over the phone received substantial interest – but little willingness to pay. Many oncologists, hospitals, and clinics already offer a similar service free-of-charge; if patients view telephone consultation as part of their core treatment, they are less willing to pay for it.

However, both patients and caregivers are open to the idea of a private business that offers supplemental services designed to enhance traditional healthcare – 52% of patients and 71% of caregivers are likely to utilize such a business. These services – be they alternative medicine, emotional counselling, or nutrition and exercise advice – appear to be needed add-ons not provided by the provincial system or covered by private insurance, and are therefore worth spending money on.



STRATEGIC CONCLUSIONS

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Pharmaceutical companies are not connecting with patients or caregivers

Both awareness of, and trust in, pharmaceutical companies among patients and caregivers is low, with less than half of the sample considering them to be a credible source of information and even fewer having taken advantage of their supplementary cancer services. As for Sanofi specifically, it has only 8% name recognition among patients, and 21% among caregivers.



STRATEGIC CONCLUSIONS

14

Respondents differ on when government is allowed to stop treatment

Approximately half of patients (and 45% of caregivers) believe that it is never acceptable for the government to not provide treatment that could prolong a life, although three in ten say it is understandable if the patient is terminal.

Both patients and caregivers have unanswered – and unanswerable – questions

While both patients and caregivers feel that the majority of their queries are being answered by their medical or support teams, they are still full of unanswered – and unanswerable – questions. What caused my (or my loved one's) cancer? Will it spread, or return? Is the worst over? Why is there no cure? Fundamentally, respondents are searching for explanations that may not exist and assurances that cannot be made.

2005	25%
2006	35%
2007	36%
2008	48%
2009	55%
2010	80%
2011	85%

2012 2013 2015

+10%

+40%

DETAILED ANALYSIS OF RESULTS





PATIENTS



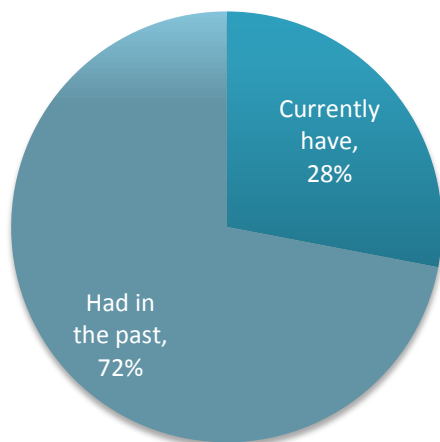
DETAILED ANALYSIS OF RESULTS

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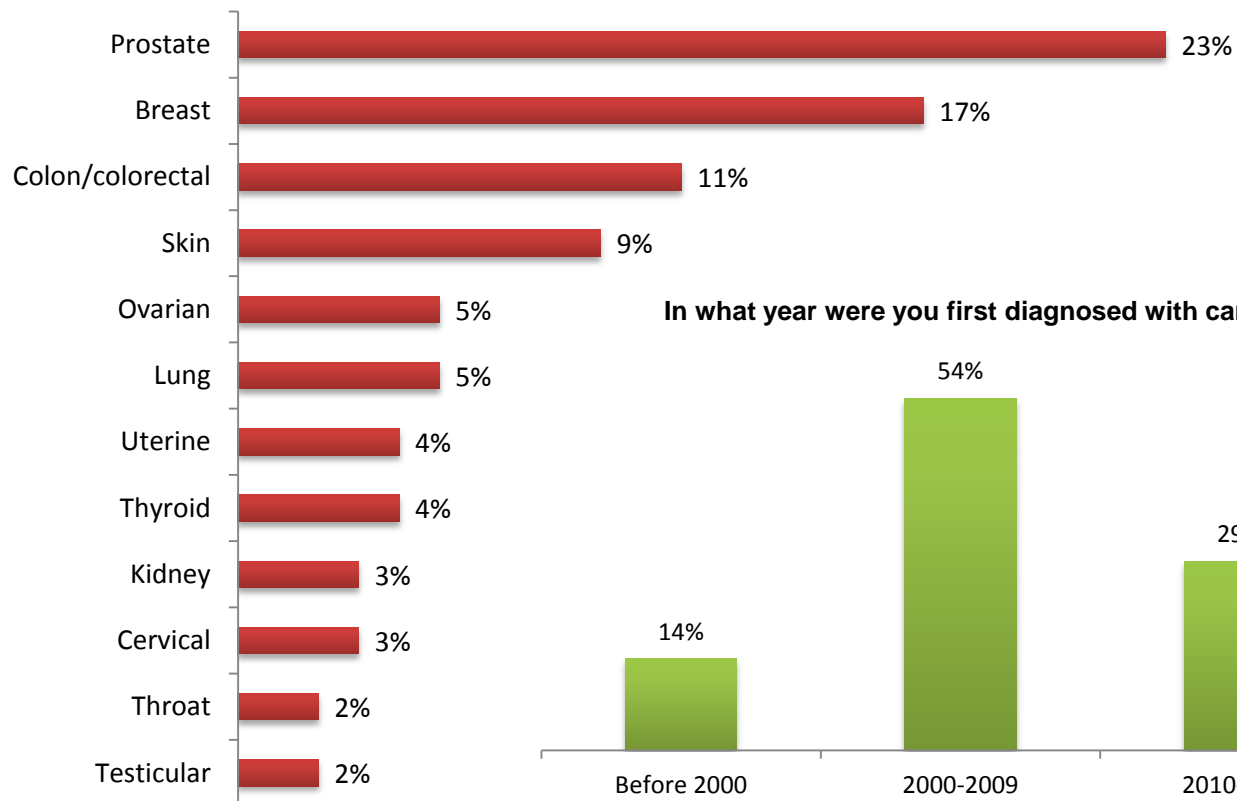
CANCER DIAGNOSIS

Within the sample of cancer patients, **28% currently have cancer** and **72% have had the disease in the past**. The most common types of cancer diagnosed include **prostate** (23%), **breast** (17%), and **colon/colorectal** (11%), and over half of the respondents were diagnosed between 2000 and 2009.

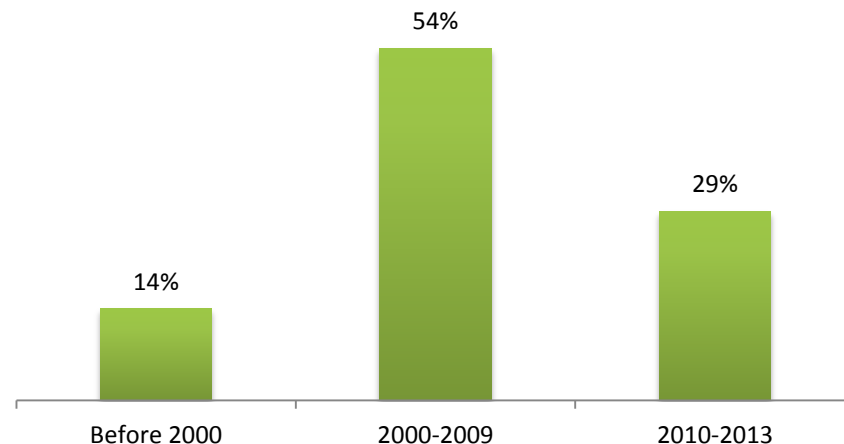
Have you ever been
diagnosed with cancer?



What type of cancer were you diagnosed with?



In what year were you first diagnosed with cancer?

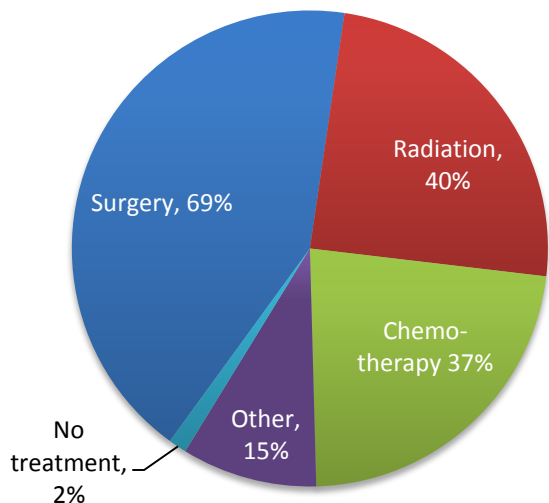




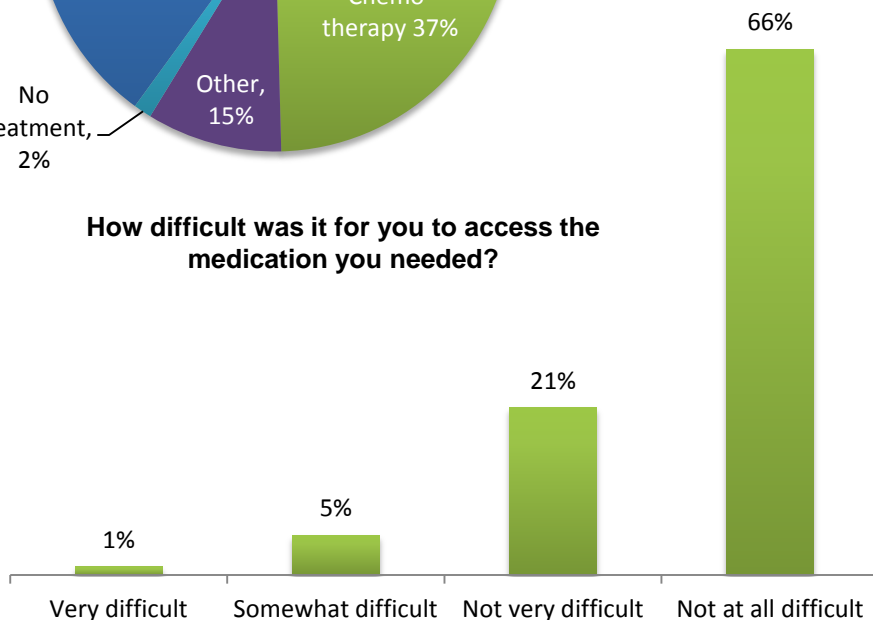
DETAILED ANALYSIS OF RESULTS

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How was your cancer treated?



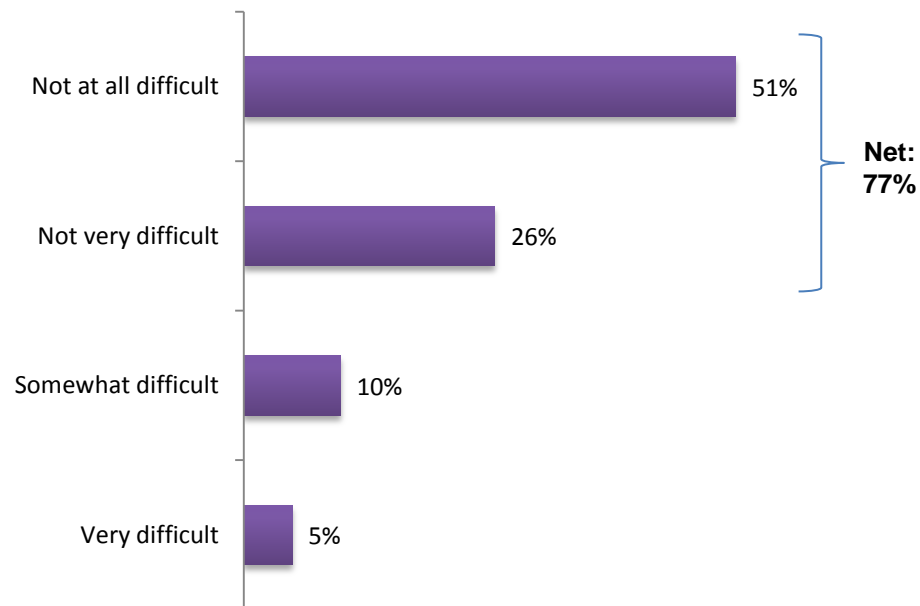
How difficult was it for you to access the medication you needed?



TREATMENT EXPERIENCE

Most patients were treated with surgery (69%), followed by radiation (40%) and chemotherapy (37%). Three quarters **did not find it difficult to access the most current/effective treatment options, nor did they have difficulty accessing the medication they needed.**

How difficult was it for you to access the most current/effective treatments?





DETAILED ANALYSIS OF RESULTS

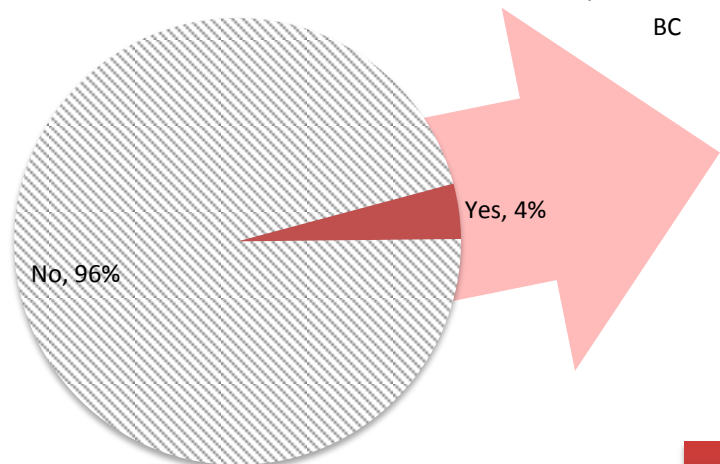
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TRAVEL FOR TREATMENT

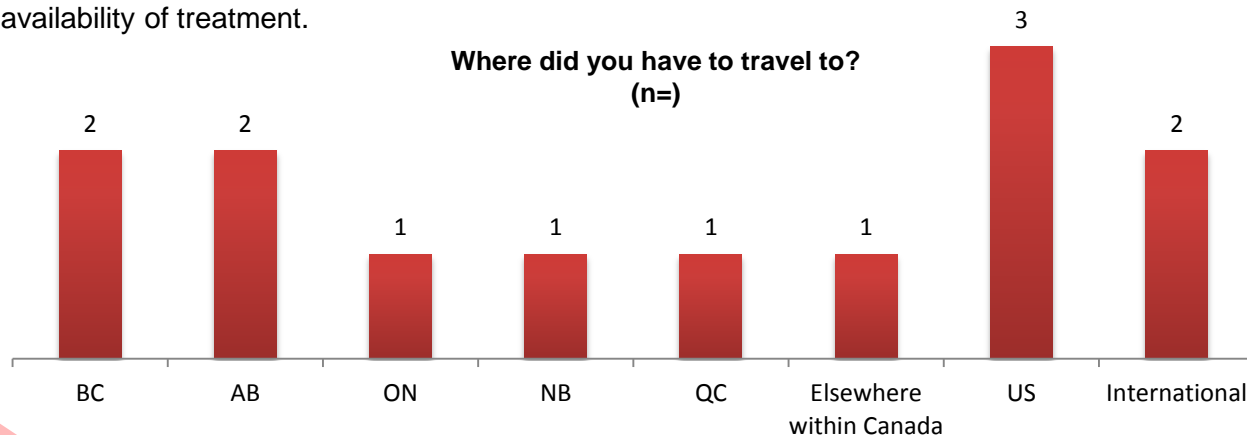
Most patients
do not have to
travel for
treatment

The vast majority of patients (96%) **report not having to travel outside their province** to receive cancer treatment. Those who did travel largely stayed within Canada, travelling primarily because of a lack of availability of treatment.

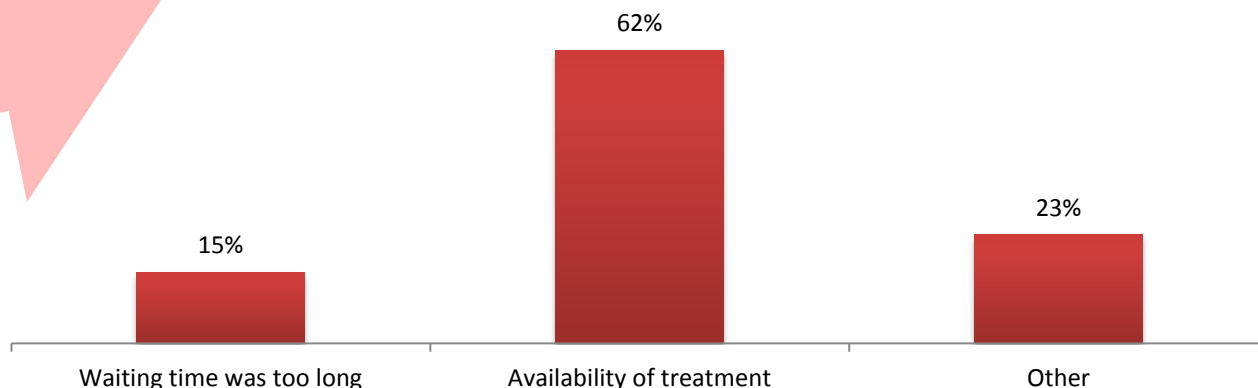
Did you have to travel outside of
your province to receive cancer
treatment?



Where did you have to travel to?
(n=)



Why did you travel?





DETAILED ANALYSIS OF RESULTS

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PERSONAL EXPERIENCE – QUALITY OF LIFE

*"Life is
on hold"*

*"The biggest
impact is the
worry, rational
or not."*

*"I'll never be
the same,
mentally."*

Most patients
acknowledge
that cancer
has impacted
their quality of
life, whether
positively or
negatively

*"I no longer work,
so am poorer, but
appreciate every bit
of life and no longer
put things off."*

*"I was left with some
permanent deficits
from treatment. I
would have preferred
not, but cannot help
but rejoice I am alive
to face these
challenges."*

*"I felt cancer would
have been easier to
deal with had I been
able to afford the
treatments I
needed."*

*"It was difficult
after the operation
as I live alone and
was emotionally
and physically
drained."*

*"I try not to
take life for
granted"*

*Cancer "[took]
a year out of
my life for
treatments"*

*"No, I don't even
have an awareness
[the] disease is even
present. I am as
active as ever,
physically fit and eat
healthy!"*



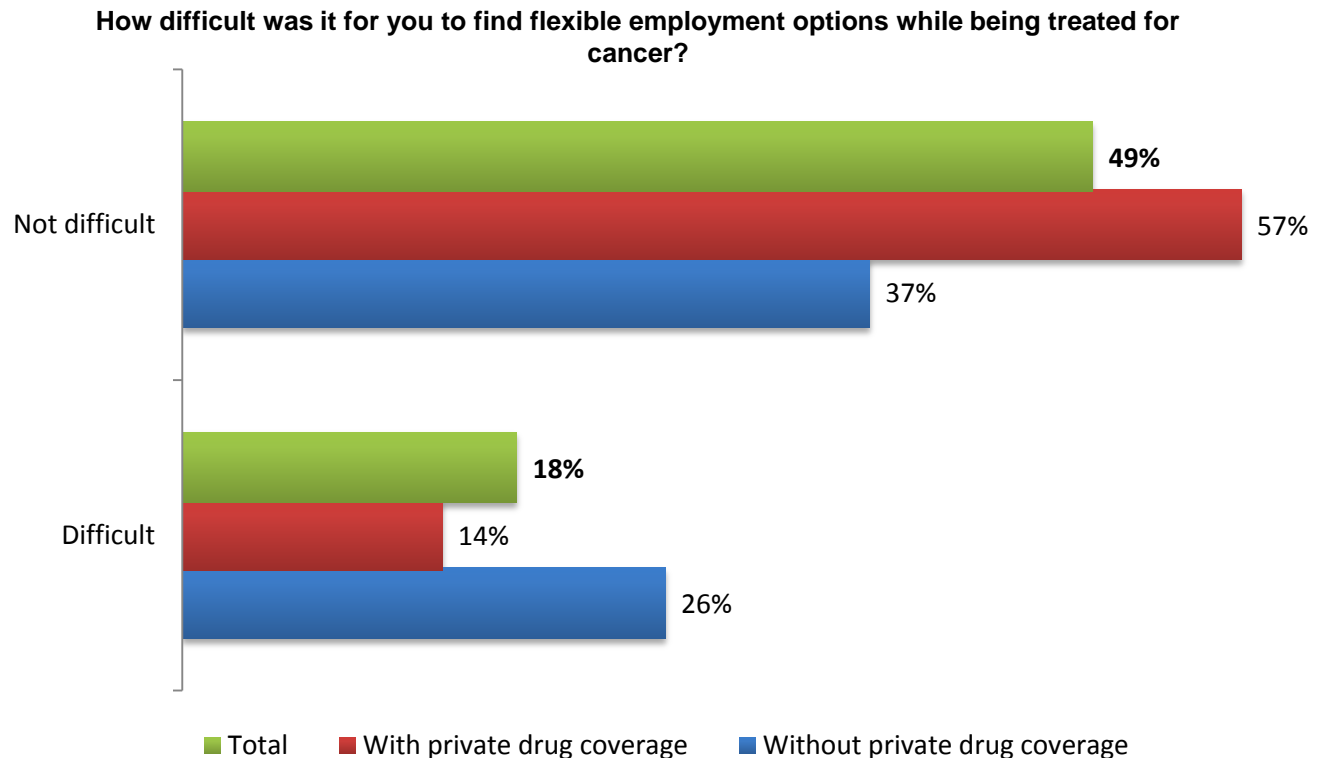
DETAILED ANALYSIS OF RESULTS

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PERSONAL EXPERIENCE – EMPLOYMENT

Canadian cancer patients have a mixed experience when it comes to finding flexible employment options while being treated for their disease – **only half report having little or no difficulty**. Those who have access to private drug coverage are more likely to feel that way (57% vs. 37% with no access), potentially because they are salaried employees with flexible office careers. Residents of British Columbia are the least likely to say they had little to no difficulty finding employment (27% vs. 51% ROC).

Half of Canadian cancer patients say they had few difficulties finding flexible employment options while undergoing treatment





DETAILED ANALYSIS OF RESULTS

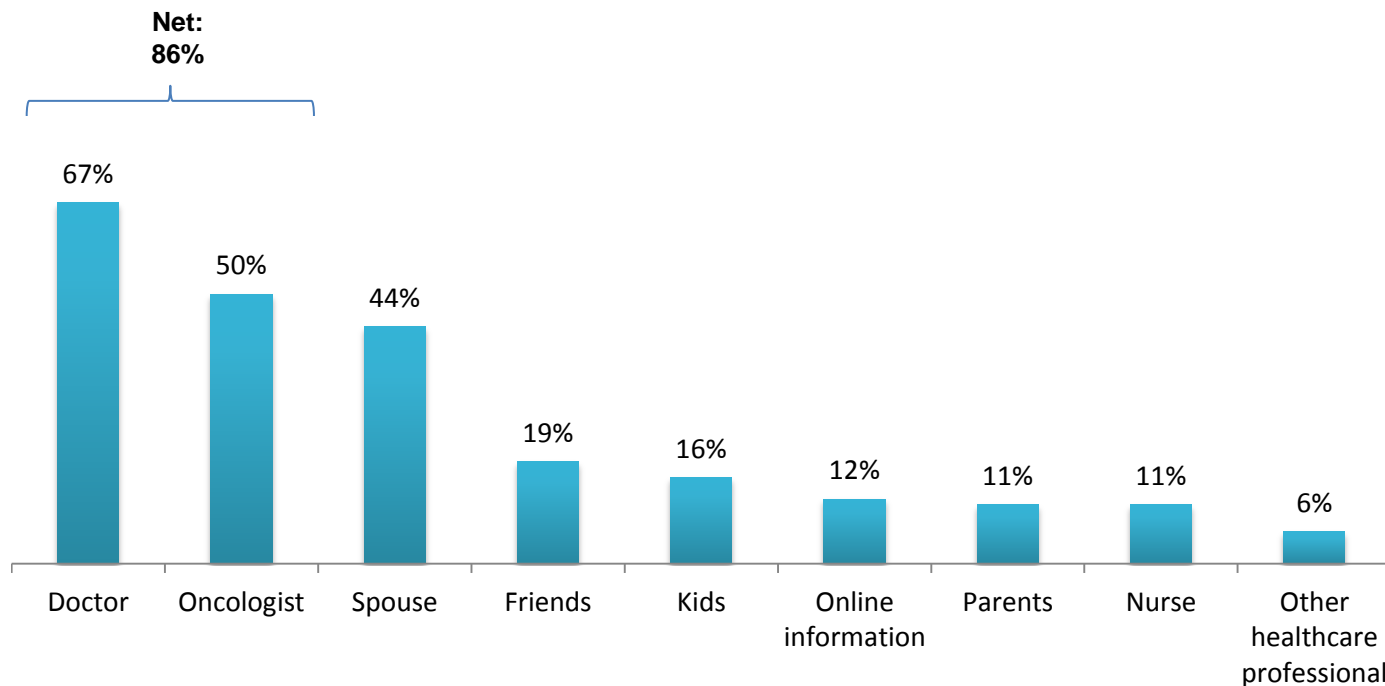
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DECISION-MAKING

The majority of Canadian cancer patients say it was **their physician who helped the most in making decisions** related to their treatment, care and support.

Patients say
their doctors
helped the
most in making
care-related
decisions

Who has helped you the most in making the decisions you have had to make with respect to your treatment, care and support?





DETAILED ANALYSIS OF RESULTS

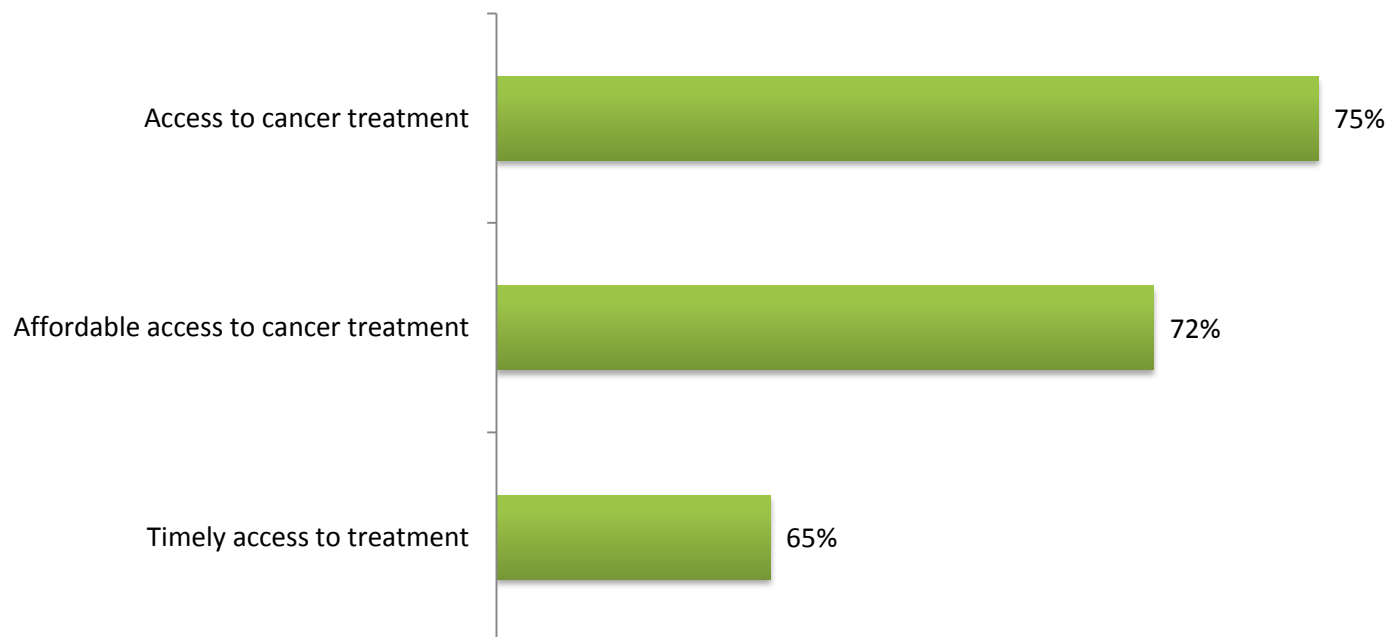
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SATISFACTION WITH PROVINCIAL GOVERNMENT

Overall, **patients are pleased with the level of care they received from their provincial governments.** Three quarters rate access to treatments highly, as do a similar share when asked about affordability. Timely access was slightly less praised, with 65% of patients rating it as excellent or very good.

How would you rate the provincial government's ability to provide each of the following?
(% Excellent/Very good)

Patients are largely satisfied with their provincial government's coverage of cancer treatment





DETAILED ANALYSIS OF RESULTS

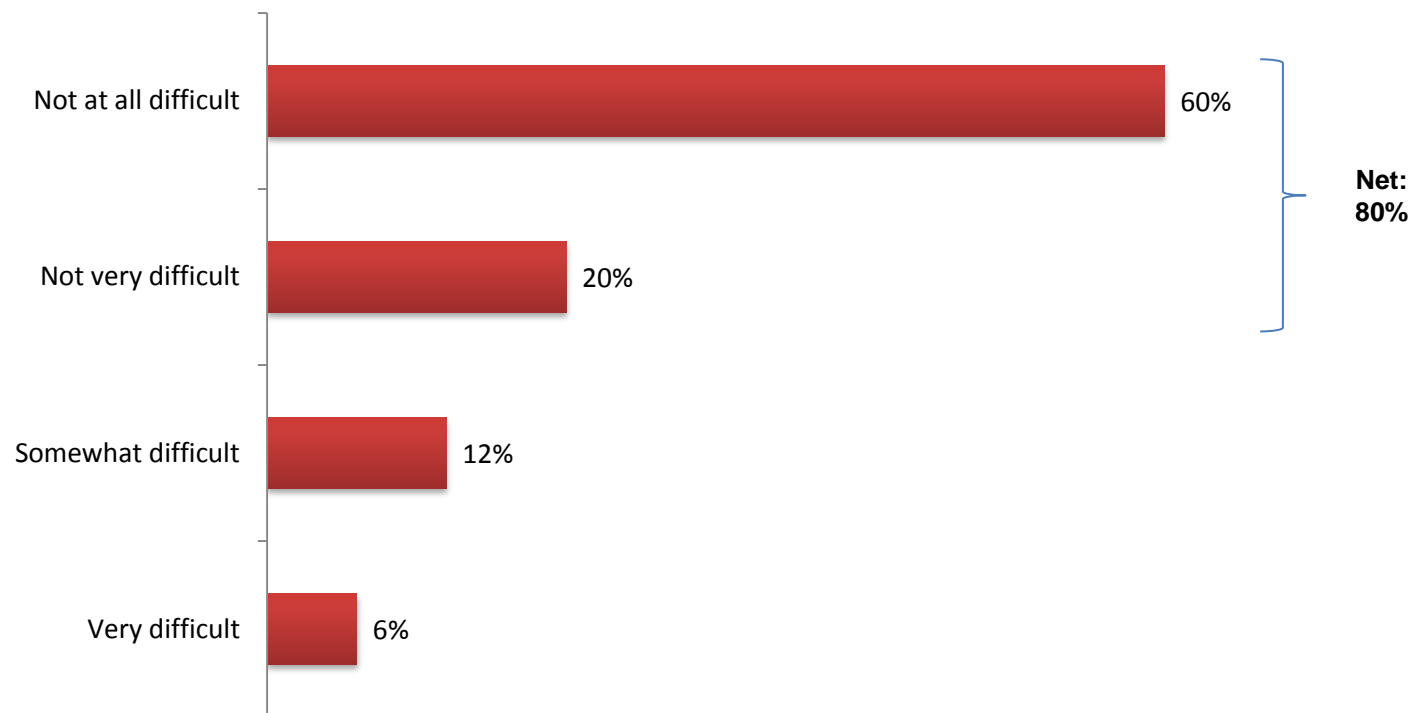
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ACCESS TO FACILITIES

Eighty percent of Canadian cancer patients had few difficulties finding healthcare facilities with adequate medical equipment close to their residence.

Most patients
do not have
difficulty
finding
adequate
medical
facilities close
to their home

How difficult was it for you to find healthcare facilities with adequate medical equipment close to your residence?





DETAILED ANALYSIS OF RESULTS

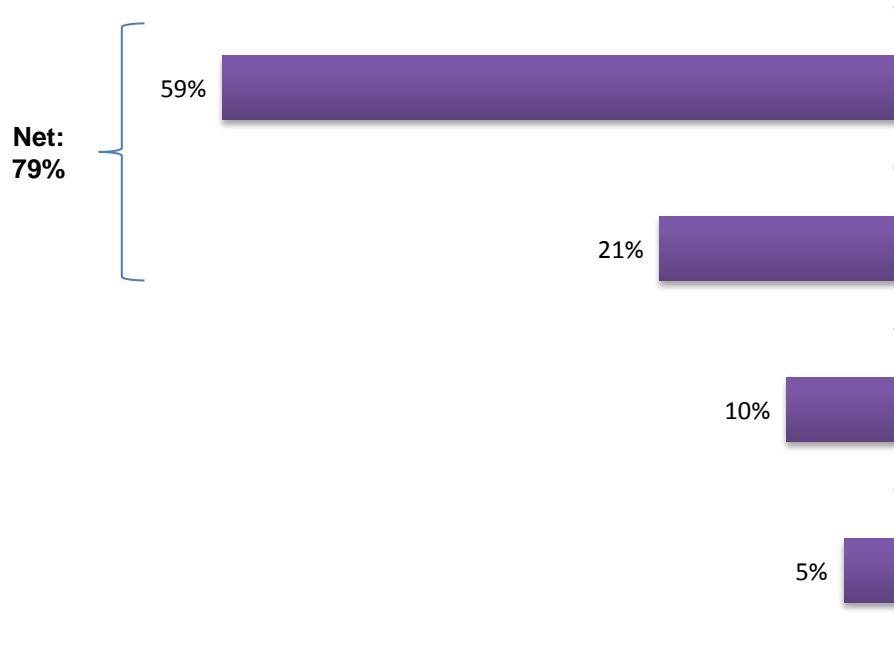
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Patients find
government
health
coverage
accessible

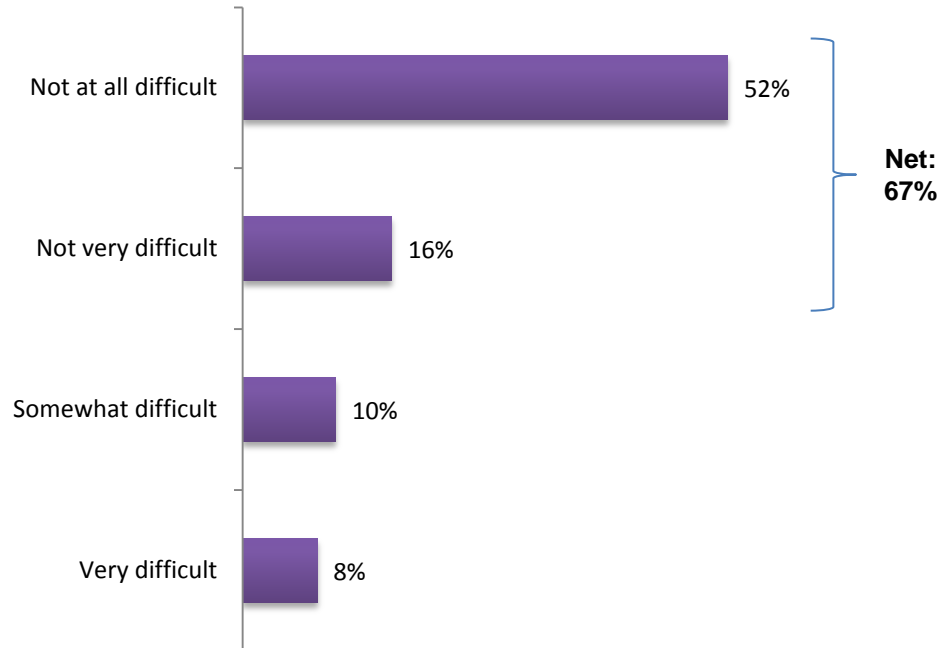
GOVERNMENT COVERAGE

Two thirds of patients say it was not difficult for them to obtain adequate provincial benefits and insurance to cover the cost of their care. Even more feel it was not difficult to access the most current/effective treatment options available through public health coverage.

How difficult was it for you to access the most current/effective treatment options available through public health coverage?



How difficult was it for you to obtain adequate provincial benefits and insurance to cover treatment costs?





DETAILED ANALYSIS OF RESULTS

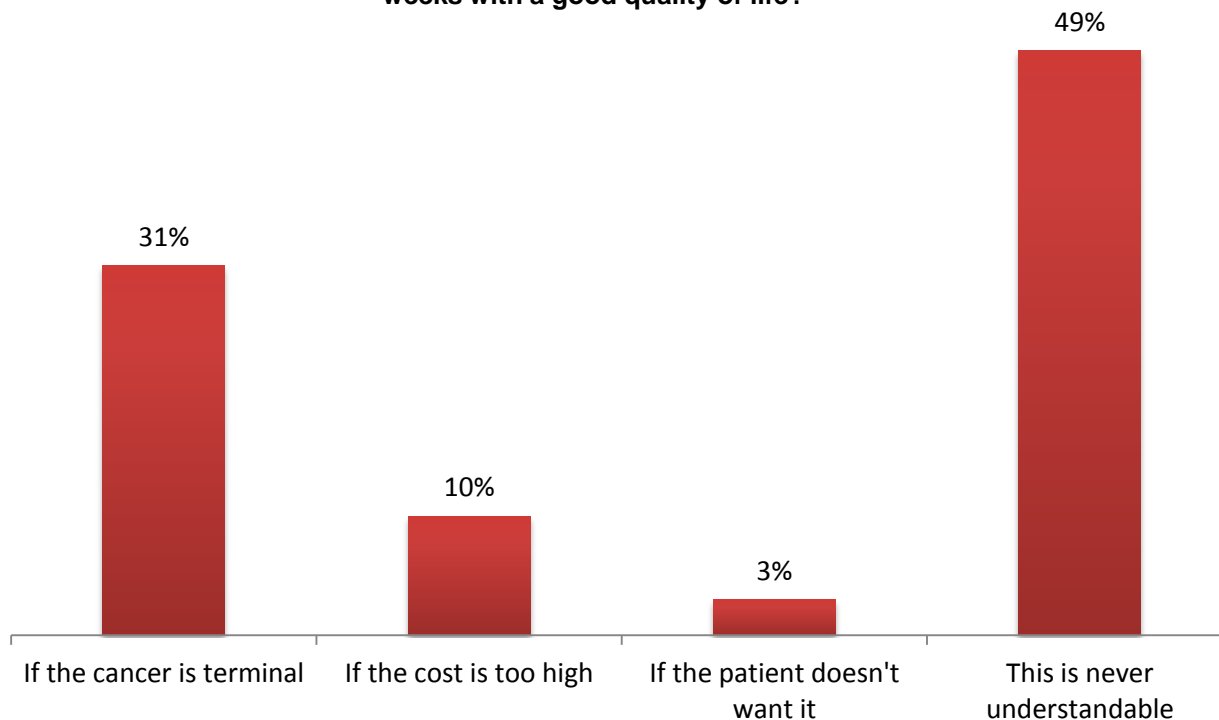
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GOVERNMENT COVERAGE RESPONSIBILITY

Approximately **half of Canadian cancer patients believe that it is never acceptable for the government to not provide treatment** that could prolong a life. Women are more likely to feel this way than men (56% vs. 41% men), while older patients are more likely to believe it acceptable if the cancer is terminal (40% of 65+ vs. 17% of 18-54).

Half of patients
believe it is
never
acceptable for the
government
not to provide
cancer
treatment

When is it understandable for the government not to provide
treatments that can prolong a cancer patient's life by only a few
weeks with a good quality of life?





DETAILED ANALYSIS OF RESULTS

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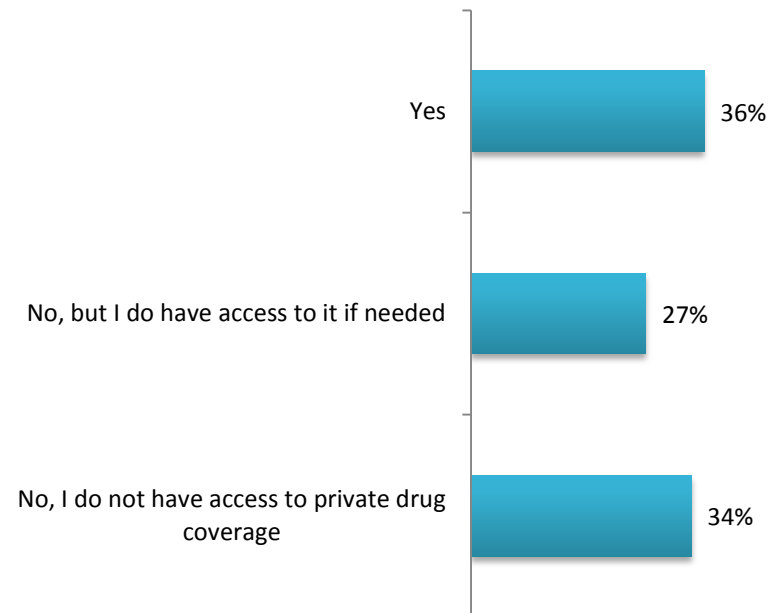
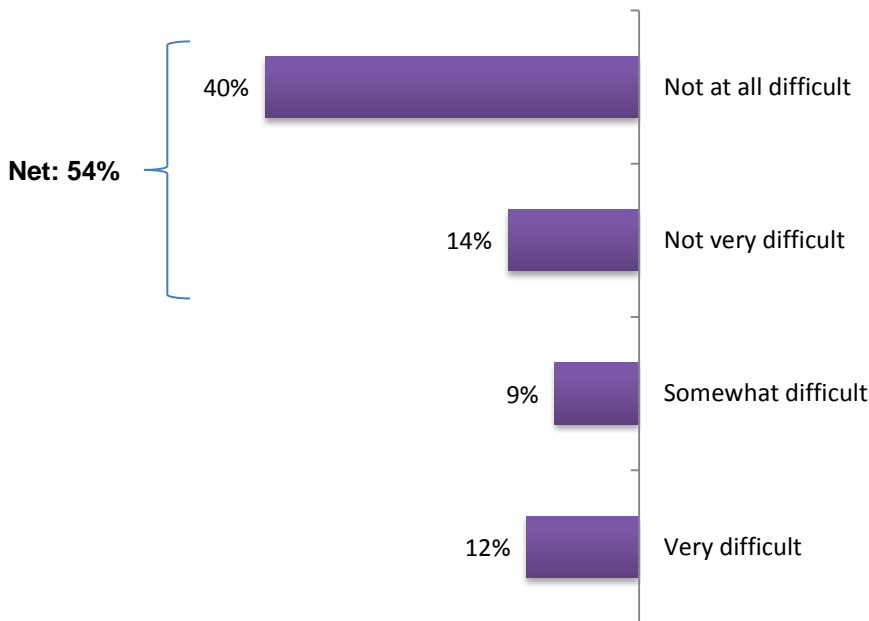
PRIVATE COVERAGE OPTIONS

Only a third
say they made
use of private
drug coverage

Half of patients say it was not difficult to obtain adequate private benefits and insurance to cover the costs of their care, and over a third report using private drug coverage for their treatment. A similar share has no access to private coverage for cancer medication.

How difficult was it for you to obtain adequate private benefits and insurance to cover treatment costs?

Have you accessed private drug coverage for your cancer treatment?





DETAILED ANALYSIS OF RESULTS

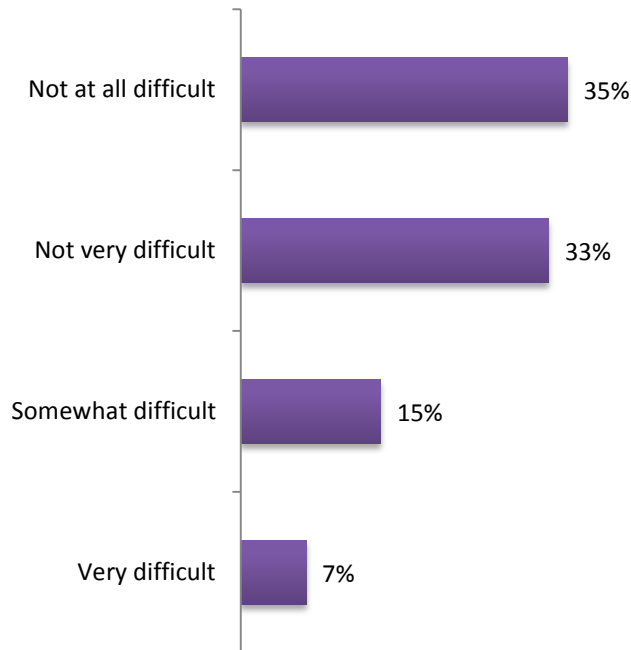
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SOURCES OF SUPPORT

Sixty-eight percent of Canadian cancer patients report **little to no difficulty in obtaining adequate emotional/psychological support**.

Many also report positive experiences with patient assistance programs, with hospitals and cancer centres cited as the most common sources of support, followed by volunteer organizations like the Canadian Cancer Society and the Volunteer Order of Nurses.

How difficult was it for you to obtain adequate emotional/psychological support?



"I have never had any patient support, but wish I had known of it, assuming it exists."

"The hospital entry personnel advised me as to how best take advantage of my employee benefit plan."

"Thank god for the Trillium Drug Plan!"

"There was no support for me. I was left to rely on my family, which made it very hard as they could never understand what I was going through."

"I have a VON [nurse] come every 28 days to our home... They're great!"

"My health care providers offered me a psychiatrist, when I felt I needed to see a financial advisor."



DETAILED ANALYSIS OF RESULTS

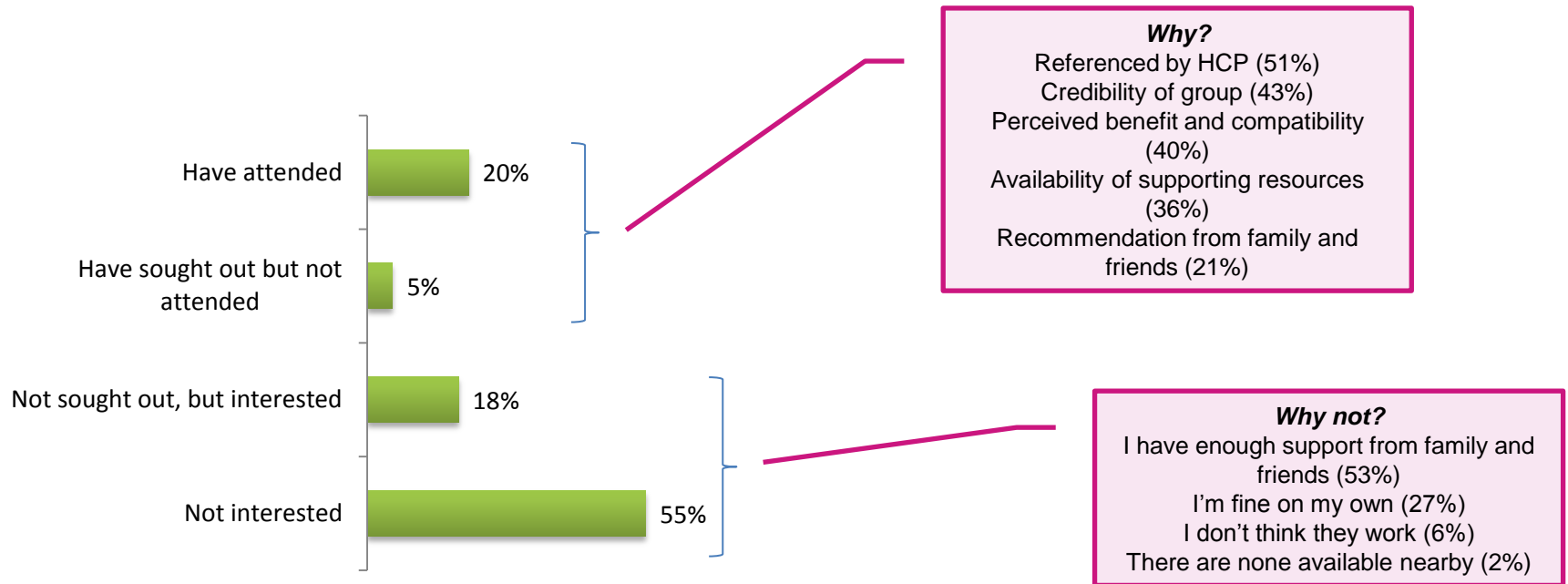
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SOURCES OF SUPPORT, CONTINUED

Most patients
have not
sought out
patient support
groups

Many **patients do not seek out patient support groups**. Fifty-five percent are not interested in them, and **only 20% report ever having attended such a group**. Those who did seek out a group were commonly encouraged by a healthcare professional, while those who have not sought one out feel they have enough support from family and friends.

Have you ever sought out or attended any patient support groups?





DETAILED ANALYSIS OF RESULTS

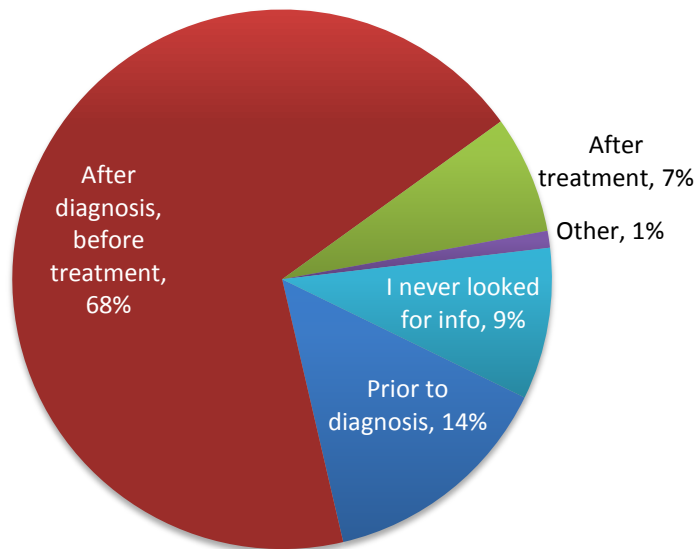
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INFORMATION AND EDUCATION

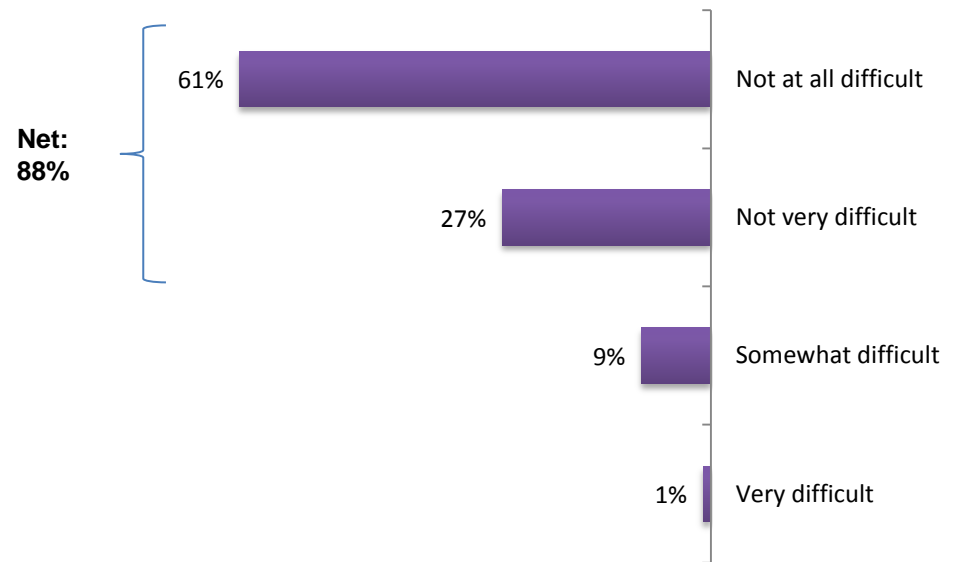
Patients do not find it difficult to access information on their conditions

Eighty-eight percent of patients do not find it difficult to access education or information on cancer prevention/treatment. Understandably, most began looking for information after they were diagnosed but before they began treatment.

When did you begin looking for information about your condition?



How difficult was it for you to access education on cancer prevention/treatment?





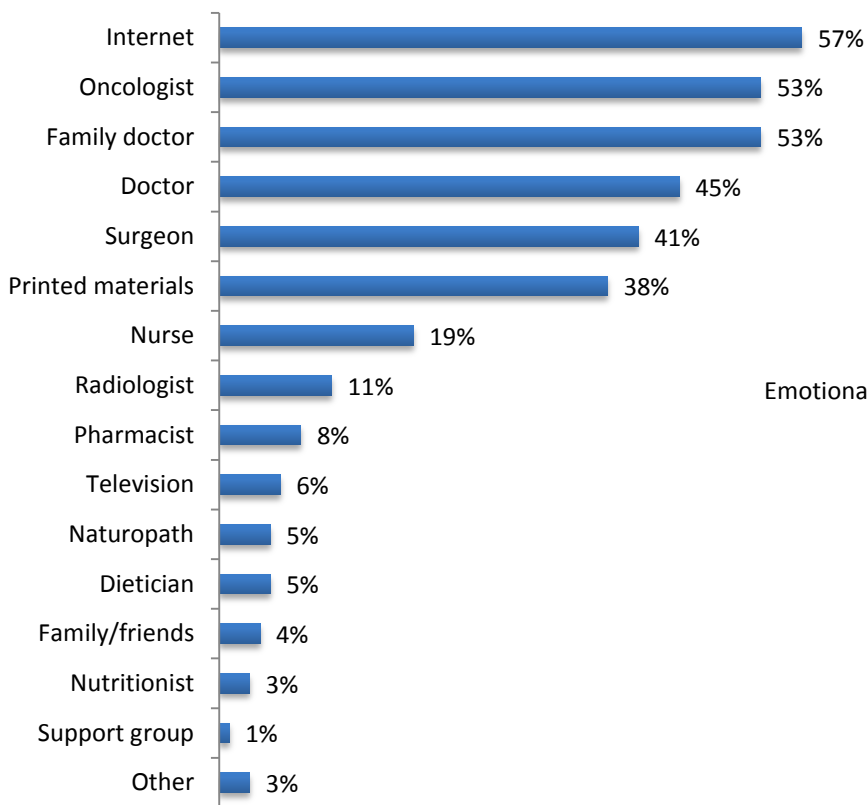
DETAILED ANALYSIS OF RESULTS

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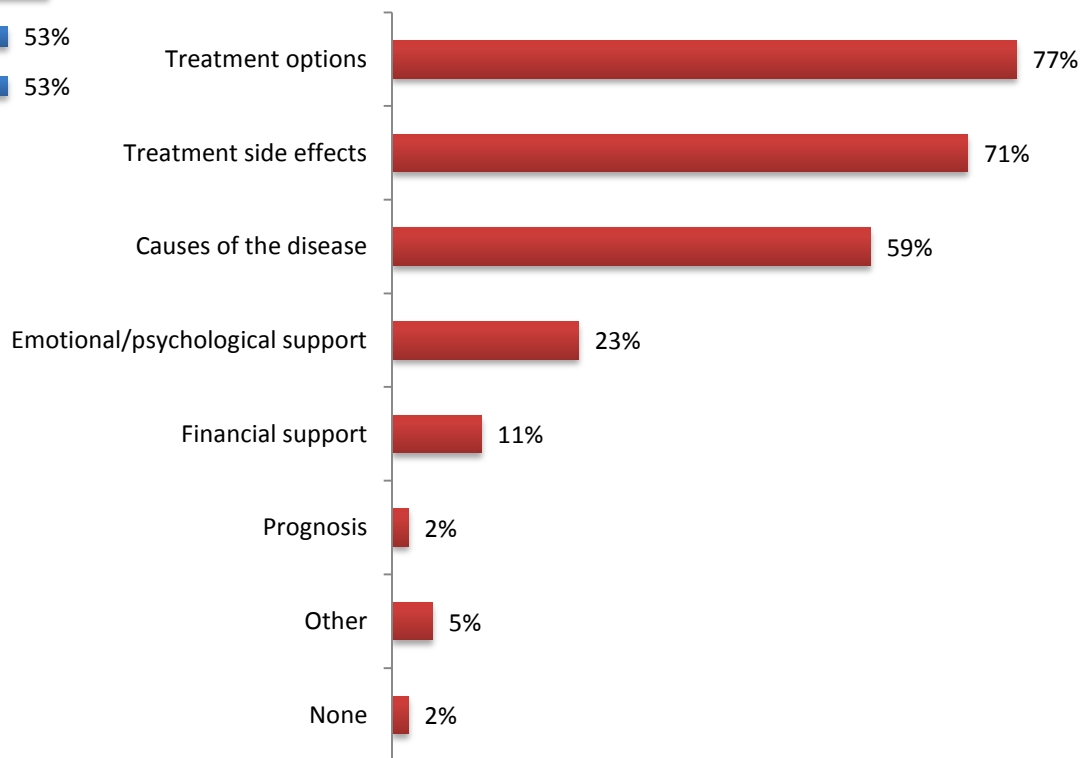
INFORMATION AND EDUCATION, CONTINUED

The **internet** (57%), their **oncologist** (53%), and their **family doctor** (53%) are the most common sources patients **reference** when seeking information about their condition. Patients are understandably most interested in treatment options (77%) and side effects (71%), but more than half are curious about the cause of their disease (59%).

Who/where have you gone for information?



What information have you sought out?





DETAILED ANALYSIS OF RESULTS

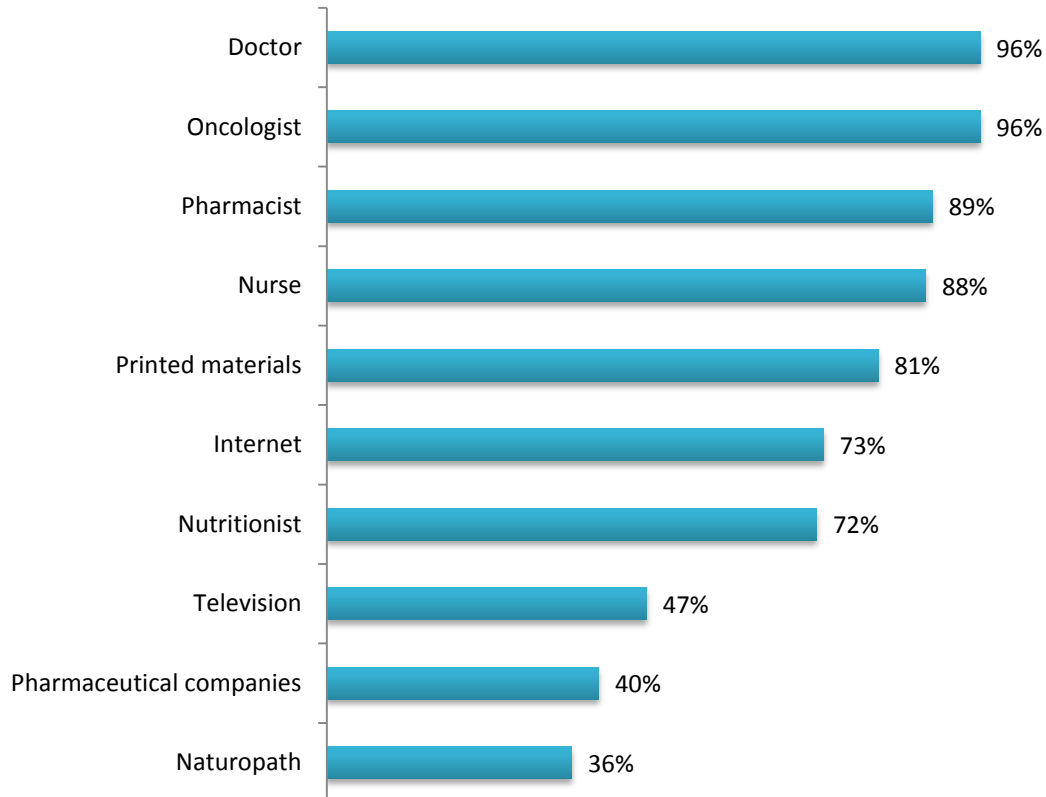
32

CREDIBILITY OF INFORMATION SOURCES

Canadian cancer patients find **oncologists and doctors** (96% each) **the most credible sources of information**, followed by pharmacists and nurses. While many patients look to the internet for information on their disease, and 73% believe it to be a credible source, 39% are unsure of how to determine if a website is reliable.

Healthcare providers are considered to be the most credible sources

How credible do you find each of the following sources to be?



How do you determine if a website is reliable?





DETAILED ANALYSIS OF RESULTS

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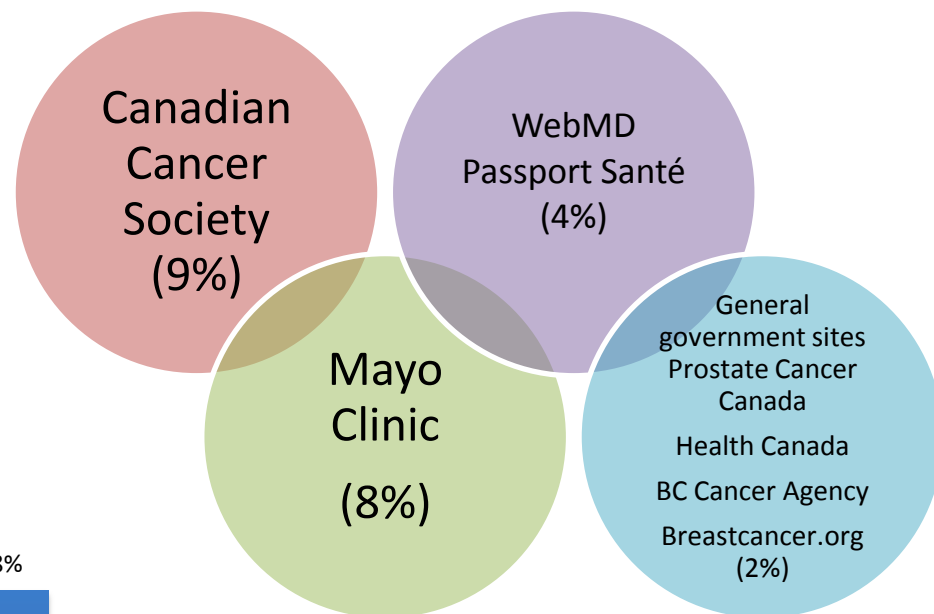
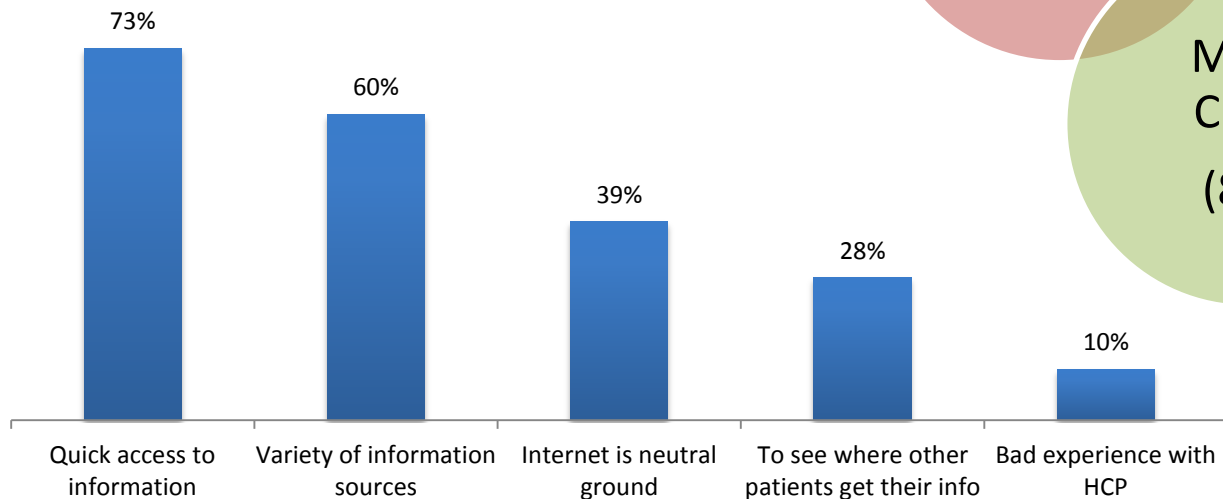
INTERNET AS SOURCE

Patients prefer to educate themselves on hospital, government, or cancer organization sites such as the Canadian Cancer Society and the Mayo Clinic.

The reason why so many patients turn to the internet is that they **are often looking for quick access to information** (73%), or because it offers a variety of sources (60%).

Are there specific websites that stand out in your mind as having been particularly useful and reliable?

For what reasons do you consult the internet?





DETAILED ANALYSIS OF RESULTS

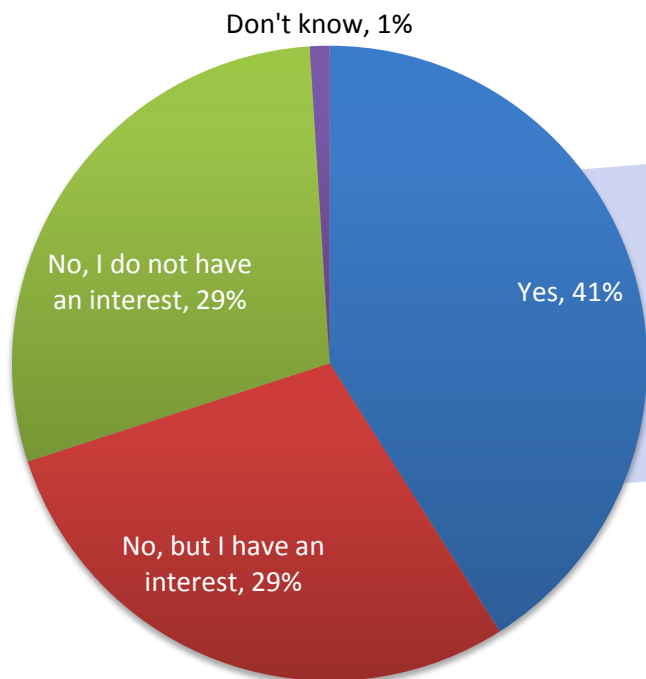
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ALTERNATIVE HEALTHCARE OPTIONS

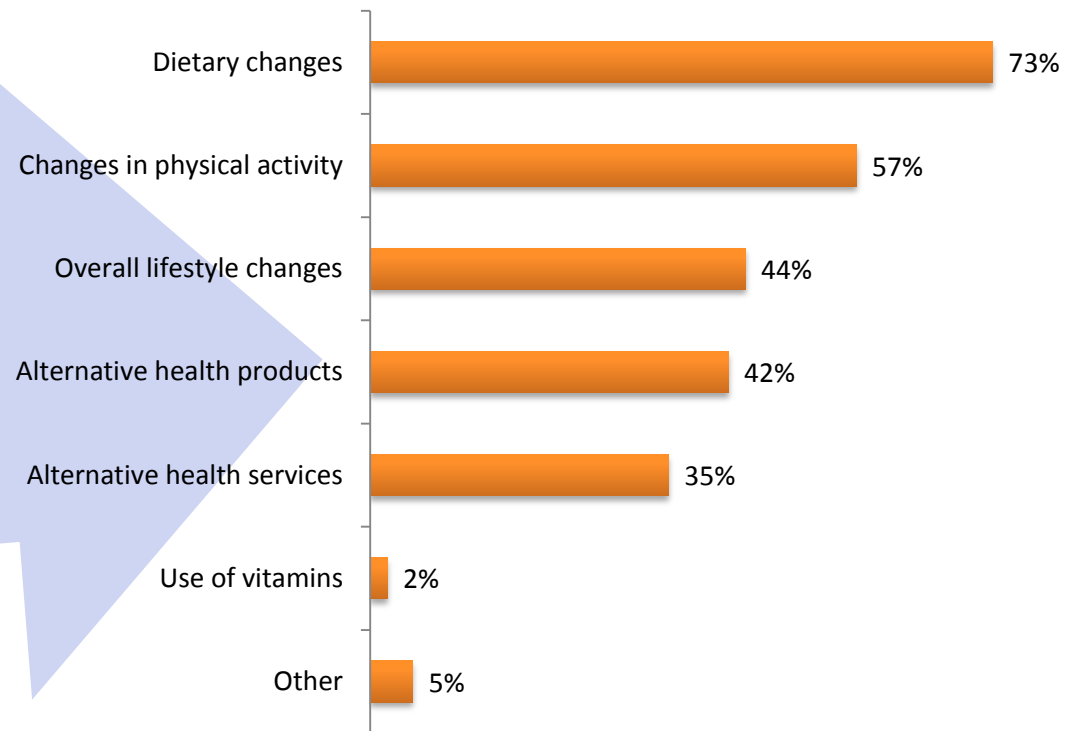
Two in five
patients look
for alternative
health
information

Forty-one percent of patients look for information on lifestyle changes or alternative health options to complement their treatment, primarily regarding dietary changes (73%) or changes in physical activity (57%).

Have you looked for any information on lifestyle changes/alternative health products or services?



What type of information did you look for?



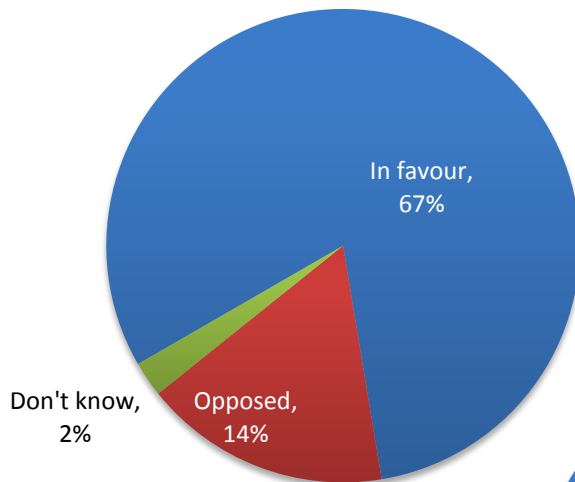


DETAILED ANALYSIS OF RESULTS

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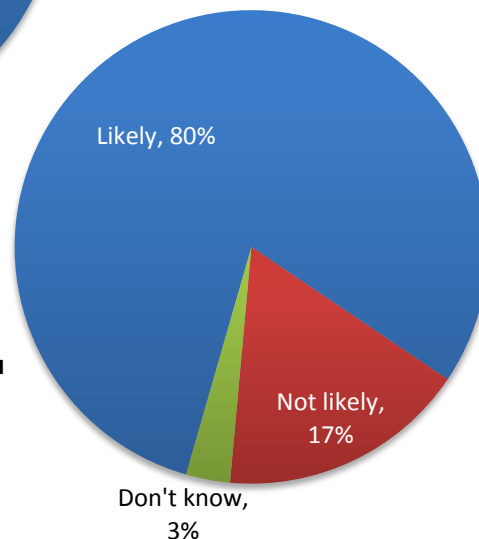
OPENNESS TO PRIVATE SERVICES

Are you in favour or opposed to out-of-hospital care?

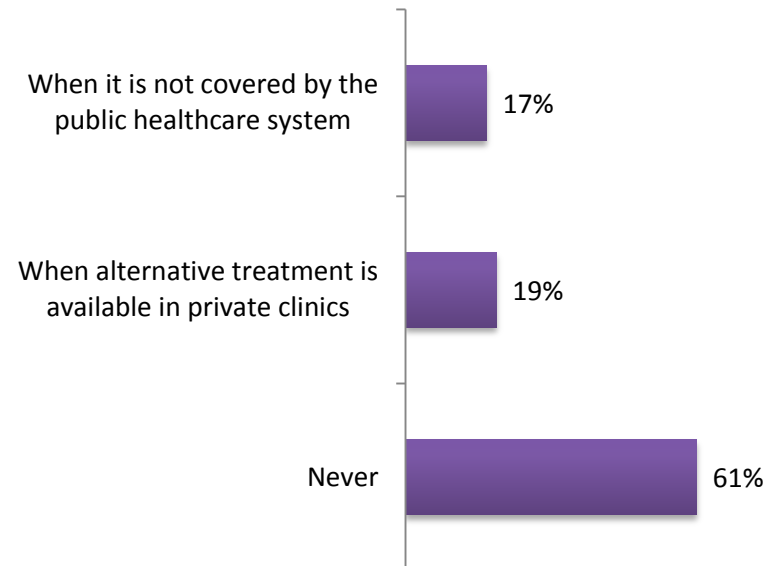


Patients are generally in favour of out-of-hospital care, and **80% say they are likely to use a service that allows them to have treatment at home**. However, **61% believe a patient should never have to pay out of pocket** for products or services.

If you had the option of receiving treatment at home, how likely would you be to use this service?



When does it make sense for a patient to pay for health care out of pocket?





DETAILED ANALYSIS OF RESULTS

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OPENNESS TO PRIVATE SERVICES, CONTINUED

Patients have mixed feelings on supplemental private health services

While **74% of patients say they are likely to use a service that linked them to oncology nurses over the phone, an equal number are not willing to pay for it.** They are more open, however, to the idea of a private business that offers supplemental services designed to enhance traditional healthcare – 52% are likely to utilize such a business.

If you had access to experienced oncology nurses over the phone, how likely would you be to use/pay for this service?

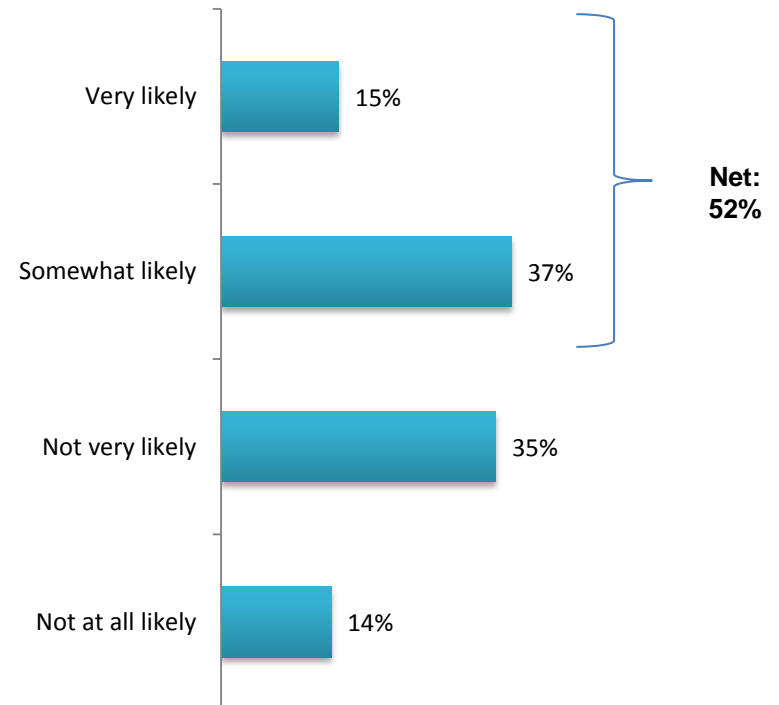


74% likely to use service

20% willing to pay for service



If a private business was offering wellness services designed to enhance and not replace traditional healthcare, how likely would you be to use these services?





DETAILED ANALYSIS OF RESULTS

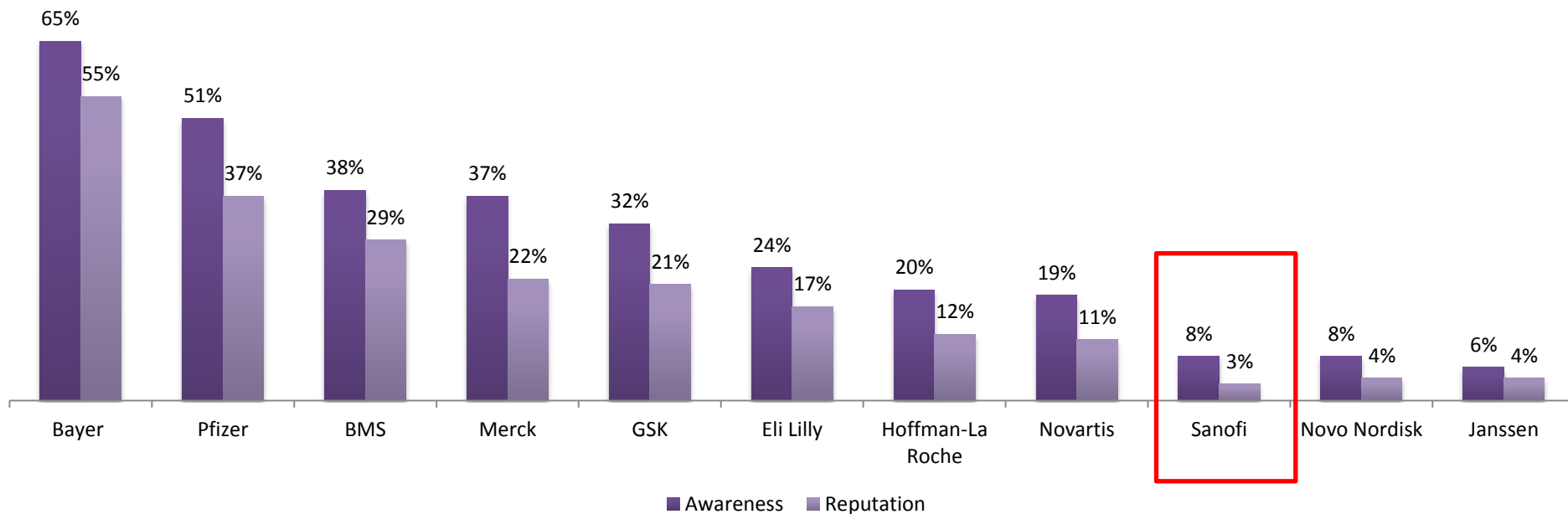
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FAMILIARITY WITH PHARMACEUTICAL COMPANIES

The reputation scores for pharmaceutical companies are low across the board

Awareness of pharmaceutical companies overall is fairly low, with over-the-counter giant Bayer the most recognized name at 65%. **Sanofi has only 8% recognition among cancer patients, leading to a reputation score of 3%.**

Do you have a good opinion, bad opinion, or you don't know the following companies?





DETAILED ANALYSIS OF RESULTS

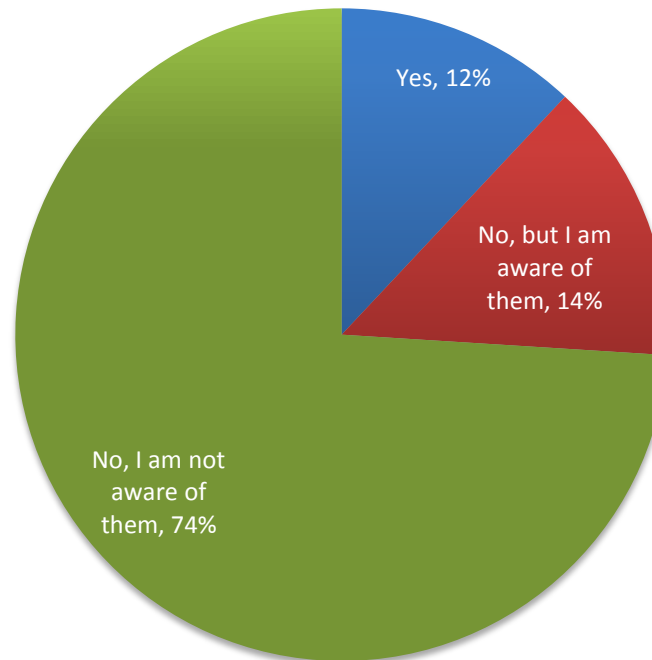
38

USE OF SERVICES PROVIDED BY PHARMACEUTICAL COMPANIES

Few patients are aware of supplemental services offered by pharmaceutical companies, with **only 12% having ever received these services**. This is potentially due to a lack of trust; only 40% of patients believe pharmaceutical companies to be a credible source of information.

Three quarters of patients are unaware of supplementary services offered by pharmaceutical companies

Have you ever received any of these free supplementary services?





DETAILED ANALYSIS OF RESULTS

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UNANSWERED QUESTIONS

Most patients say they do not have unanswered questions, or have questions that cannot be answered.

Some are interested in alternative treatment recommendations, causes of their cancer, or unexpected side effects of treatment.





CAREGIVERS



DETAILED ANALYSIS OF RESULTS

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CAREGIVER SAMPLE

Sixty-two percent of the sample is currently the caregiver for someone with cancer, and 38% are former caregivers. Surprisingly, **men are more likely to be current caregivers** than women (71% vs. 57%).

More men than
women are
current
caregivers



38% past
caregivers



62% current
caregivers



DETAILED ANALYSIS OF RESULTS

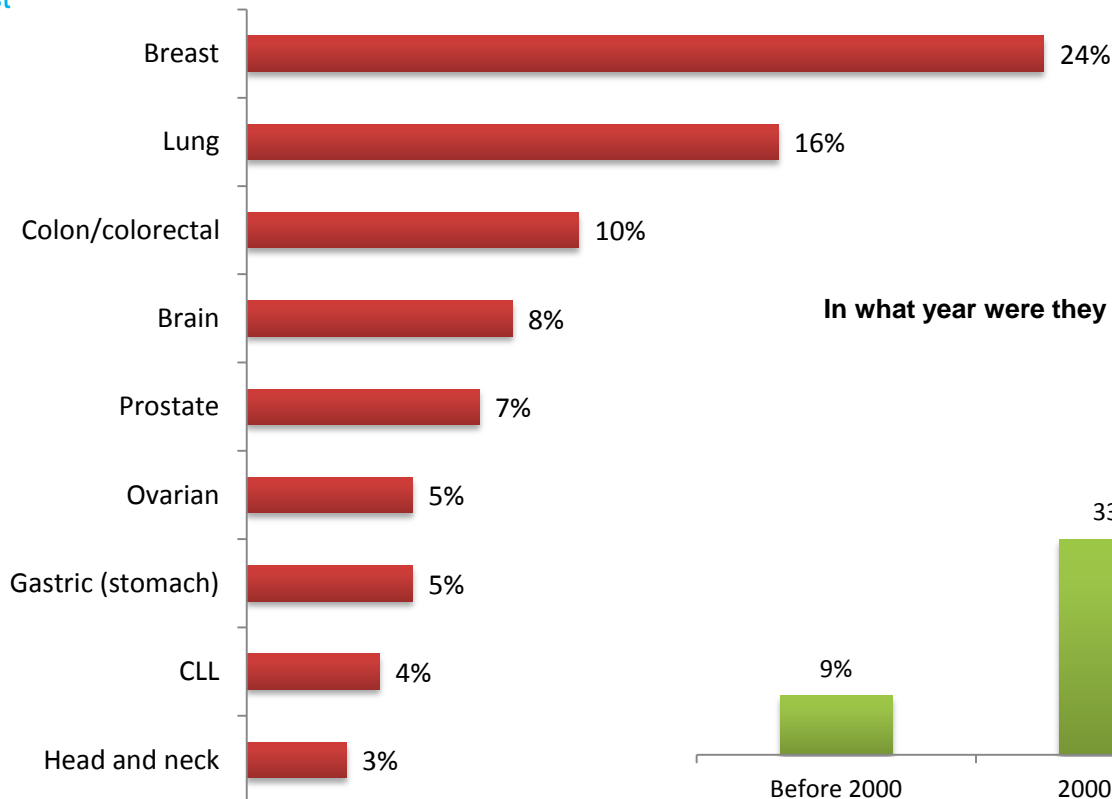
42

CANCER DIAGNOSIS

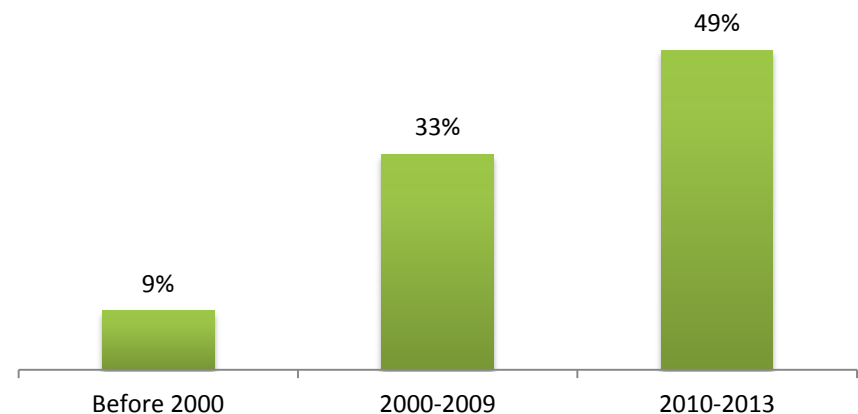
Caregivers
most
commonly
report caring
for breast
cancer
sufferers

The individuals with cancer for whom caregivers are responsible have been most commonly diagnosed with **breast cancer** (24%), **lung cancer** (16%), and **colon/colorectal cancer** (10%). Half of caregivers say this diagnosis occurred between 2010 and 2013.

What type of cancer were they diagnosed with?



In what year were they first diagnosed with cancer?



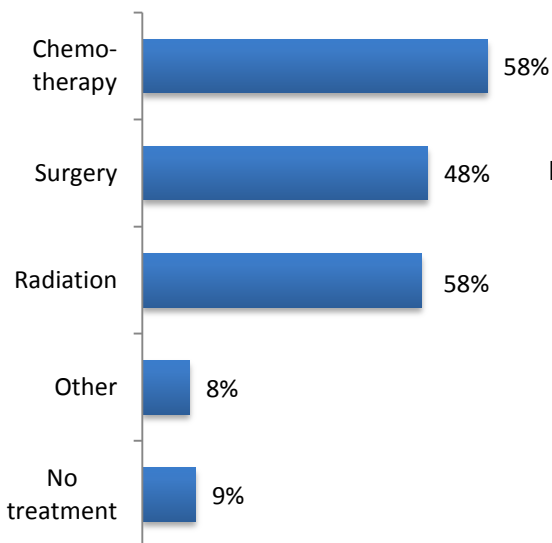


DETAILED ANALYSIS OF RESULTS

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TREATMENT EXPERIENCE

How was their cancer treated?

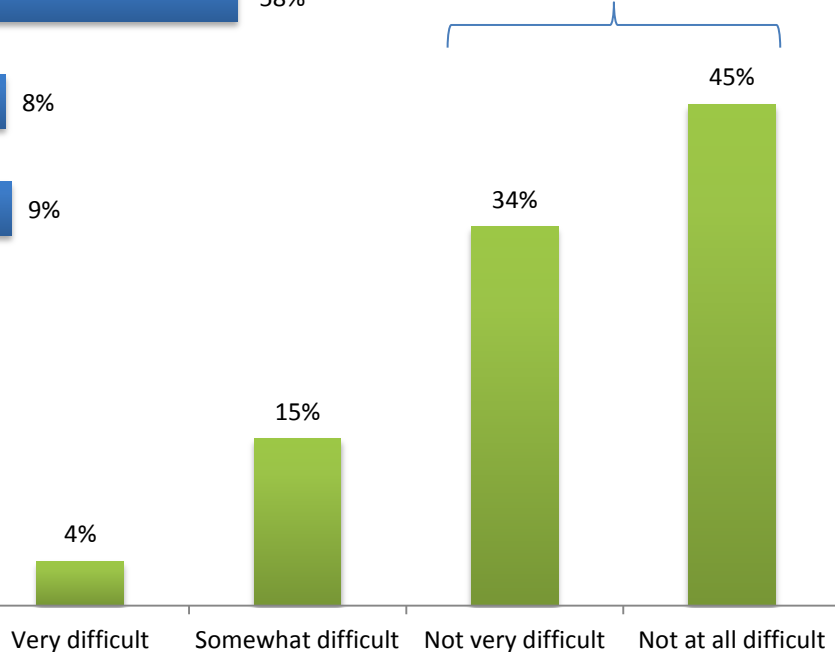


The **most common treatment reported by caregivers is chemotherapy (58%)**, followed by surgery (48%) and radiation (47%).

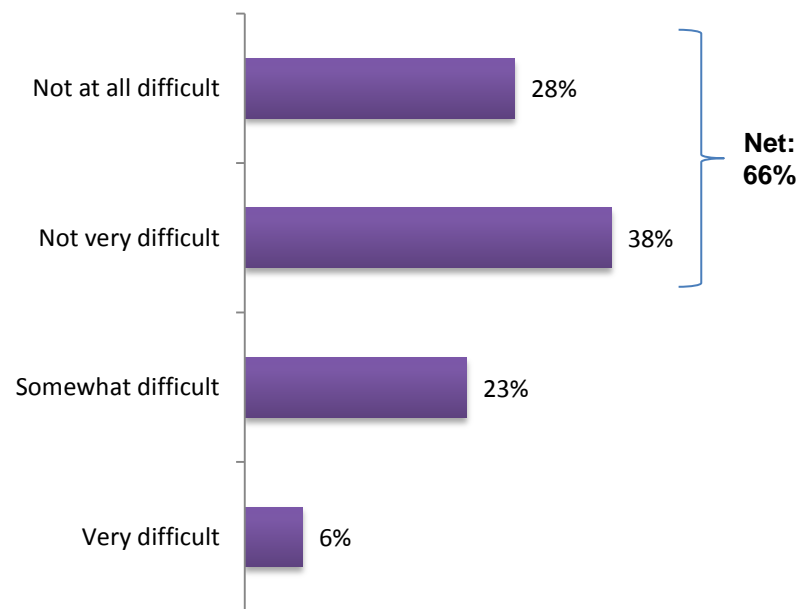
Two thirds **do not find it difficult to help their dependent access medication**, and 79% have little trouble accessing the most current or effective treatments.

How difficult was it for them to access the medication they needed?

Net: 79%



How difficult was it for them to access the most current/effective treatments?





DETAILED ANALYSIS OF RESULTS

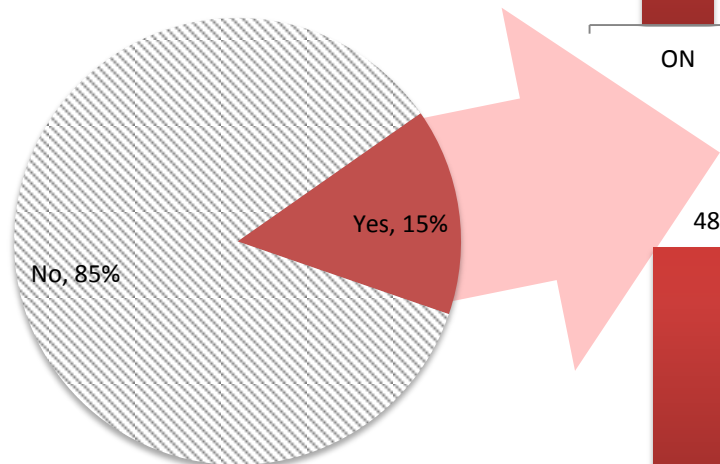
44

TRAVEL FOR TREATMENT

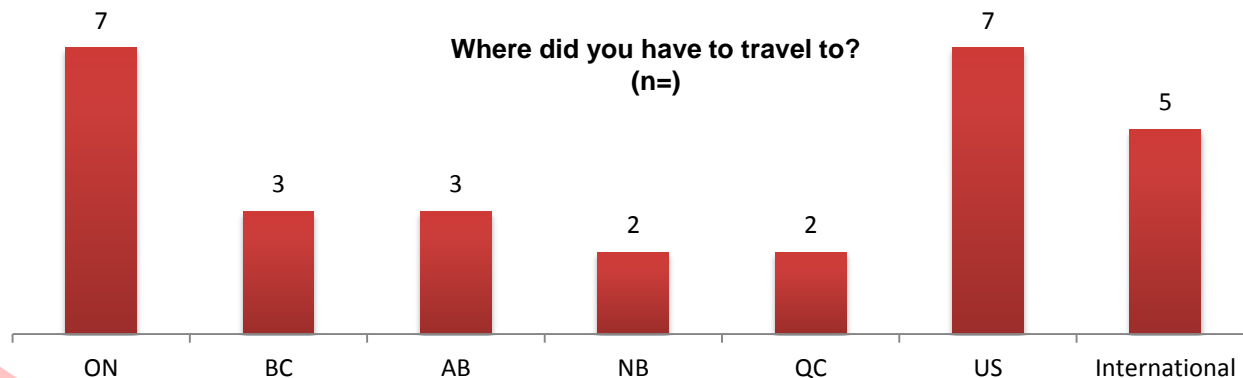
More caregivers report having to travel out of province for treatment than patients (15% vs. 4% patients). An equal share of those who travelled went to Ontario and the United States (23% each). Sixteen percent report a non-US international visit in order to seek treatment. Half of caregivers who travelled cite wait times as the reason, followed by availability of treatment (38%).

Half of caregivers who travelled cite long wait times as the reason

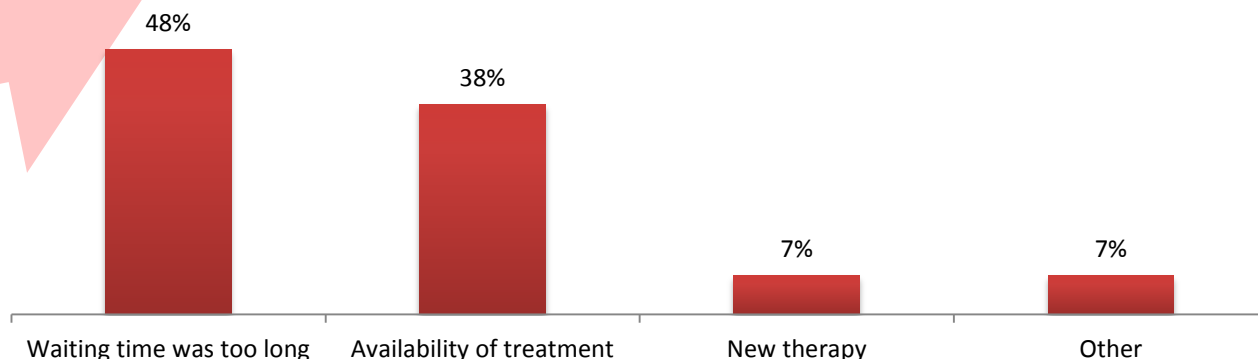
Did you have to travel outside of your province to receive cancer treatment?



Where did you have to travel to?
(n=)



Why did you travel?





DETAILED ANALYSIS OF RESULTS

45

PERSONAL EXPERIENCE – QUALITY OF LIFE

Most caregivers acknowledge that cancer has had a substantial impact on their life, from decreasing the quality of their mental health, to disrupting their own lives, to making them appreciate what they have.

*Caregiving is
“emotionally
and physically
draining.”*

*“Death is a part of life.
Taking care of my dad while
he was dying was what I
wanted to do so, no, it did
not impact the quality of my
life. What it did do was
change my priorities for a
time.”*

*“Made me
more aware
of my own
mortality.”*

*“I have
increased
concern for
my health.”*

*“Every last waking minute
is spent finding
information on new
treatments and worrying.
Every last dime has been
spent to make sure our
son has a good life.”*

*“I had to make some
major lifestyle
changes in order to
support the person I
was taking care of.”*

*“It is harder to
support myself
financially.”*

*“It’s made some
things tougher,
but all in all I still
keep a positive
outlook on life.”*



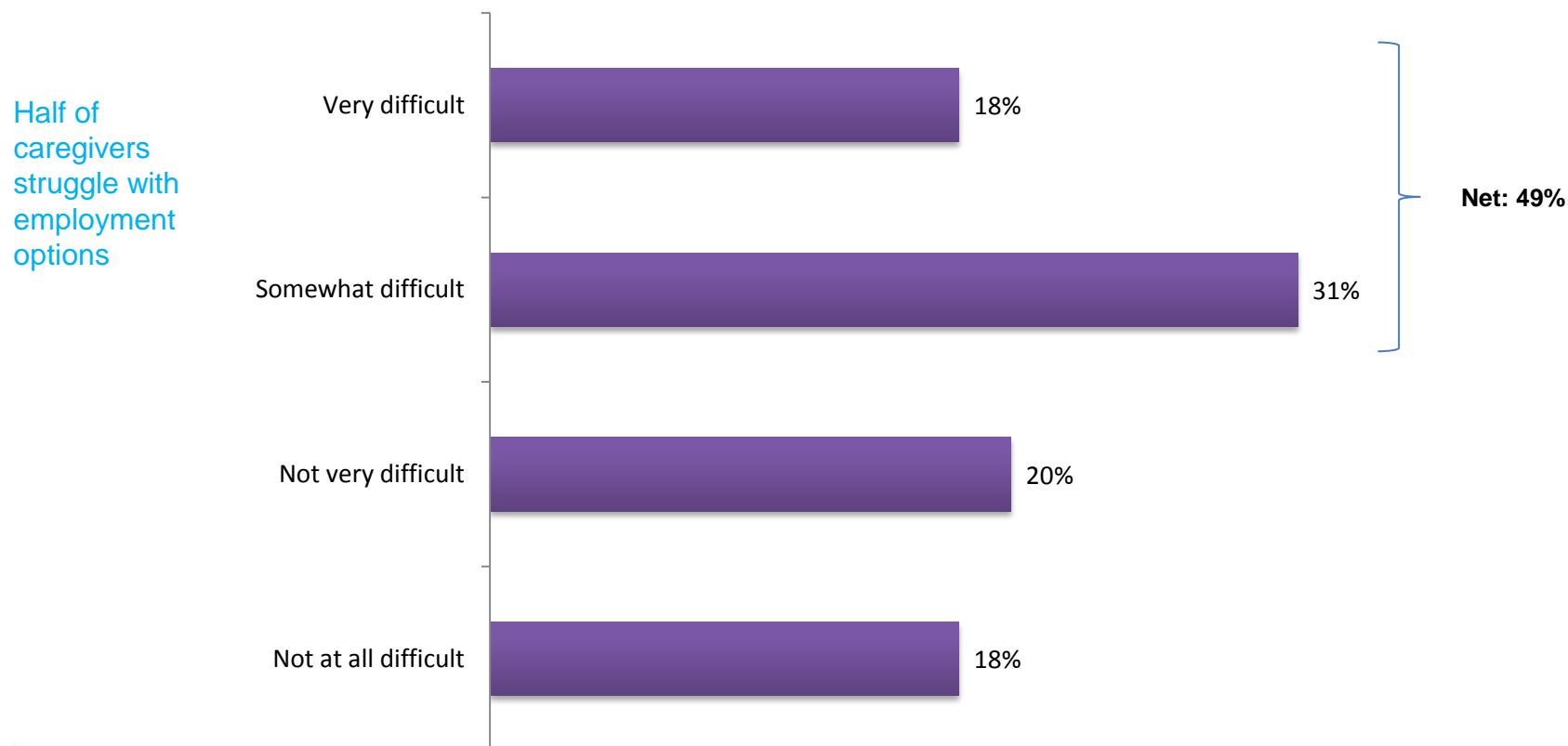
DETAILED ANALYSIS OF RESULTS

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PERSONAL EXPERIENCE – EMPLOYMENT

Half of caregivers have difficulty finding flexible employment options while being a caregiver. Many note that it has forced them to choose between work and care, including taking time off from work or preventing them from moving for work. In addition, caregiving is a source of financial stress.

How difficult was it for you to find flexible employment options while being a caregiver?





DETAILED ANALYSIS OF RESULTS

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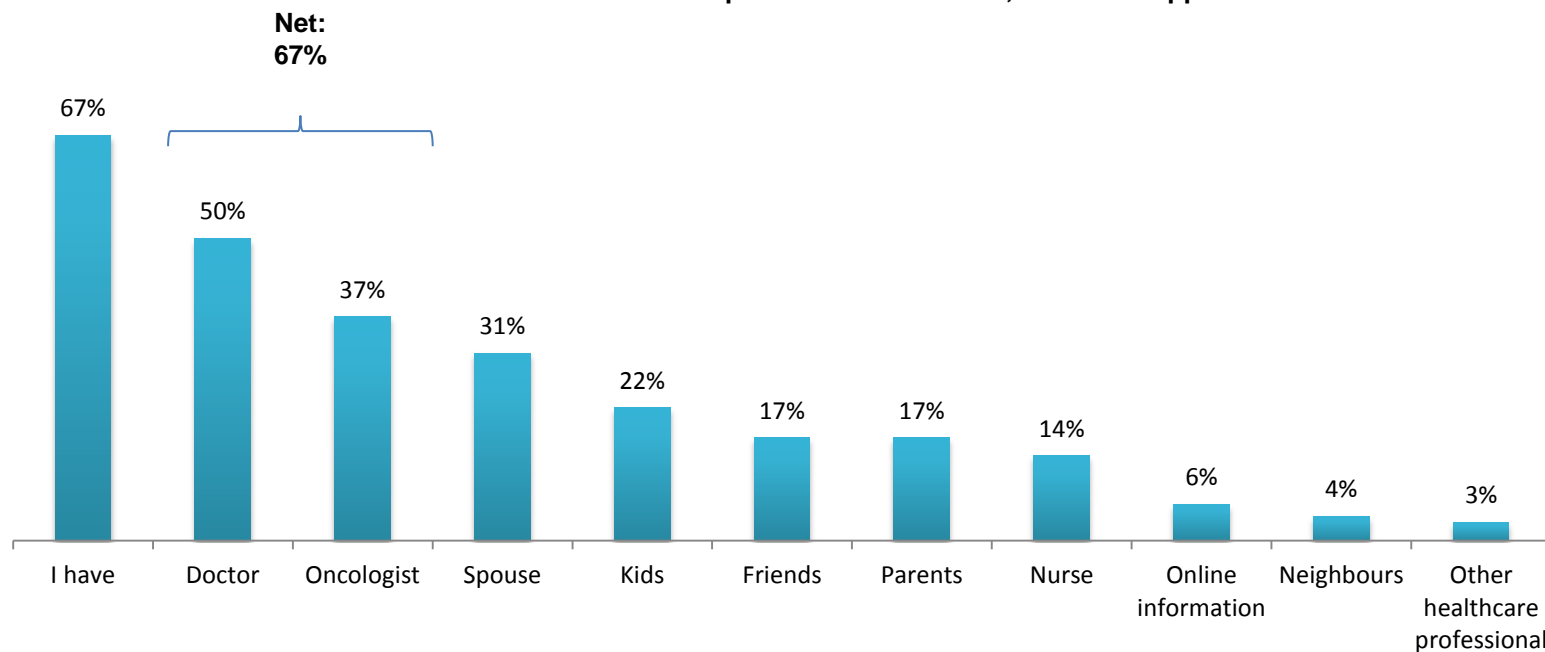
DECISION-MAKING

Caregivers say
they help the
most in
decision-
making

In stark contrast to the patient sample, **two thirds of caregivers say *they* are the ones who help **their dependents make decisions** related to care.**

While 86% of patients say it is their doctor or oncologist who helps the most, only 67% of caregivers feel the same way.

Who has helped the most in making the decisions they have had to make with respect to their treatment, care and support?





DETAILED ANALYSIS OF RESULTS

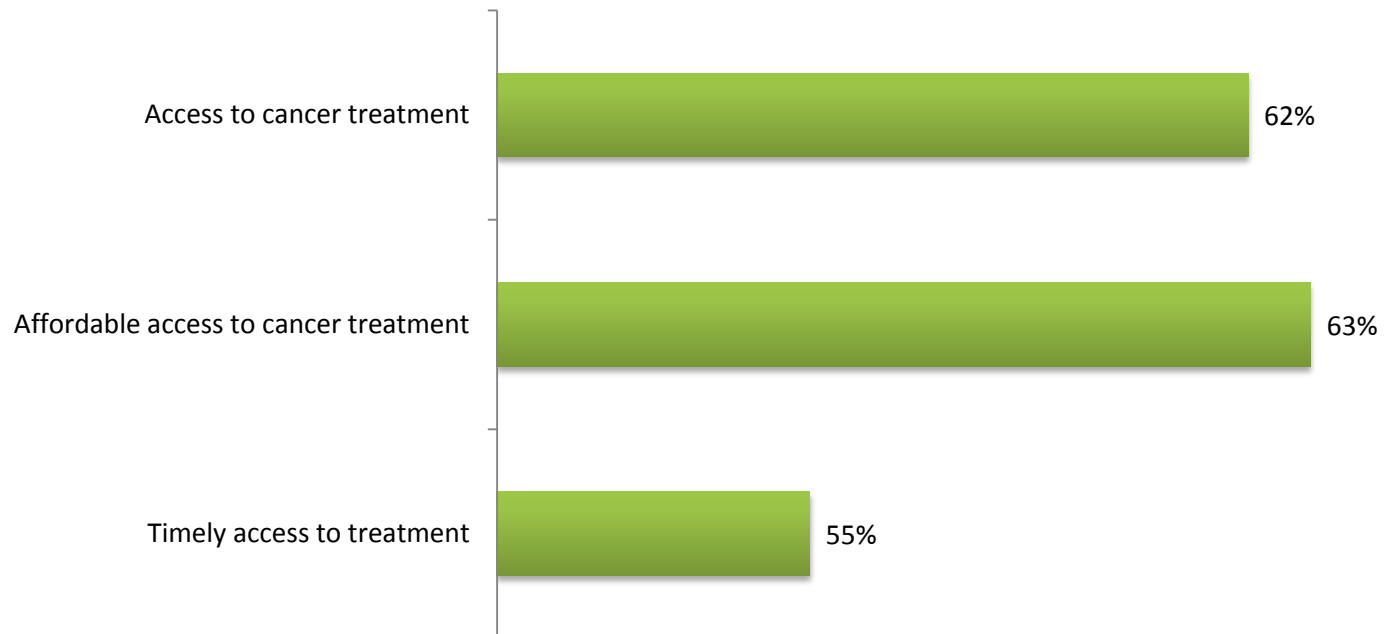
48

SATISFACTION WITH PROVINCIAL GOVERNMENT

Though **caregivers are generally satisfied** with the access to and affordability of care provided by their provincial governments, **they are less enthusiastic than patients**. Only half of caregivers rate the timeliness of access to treatments highly.

Caregivers are less satisfied with provincial services than patients

How would you rate the provincial government's ability to provide each of the following?
(% Excellent/Very good)





DETAILED ANALYSIS OF RESULTS

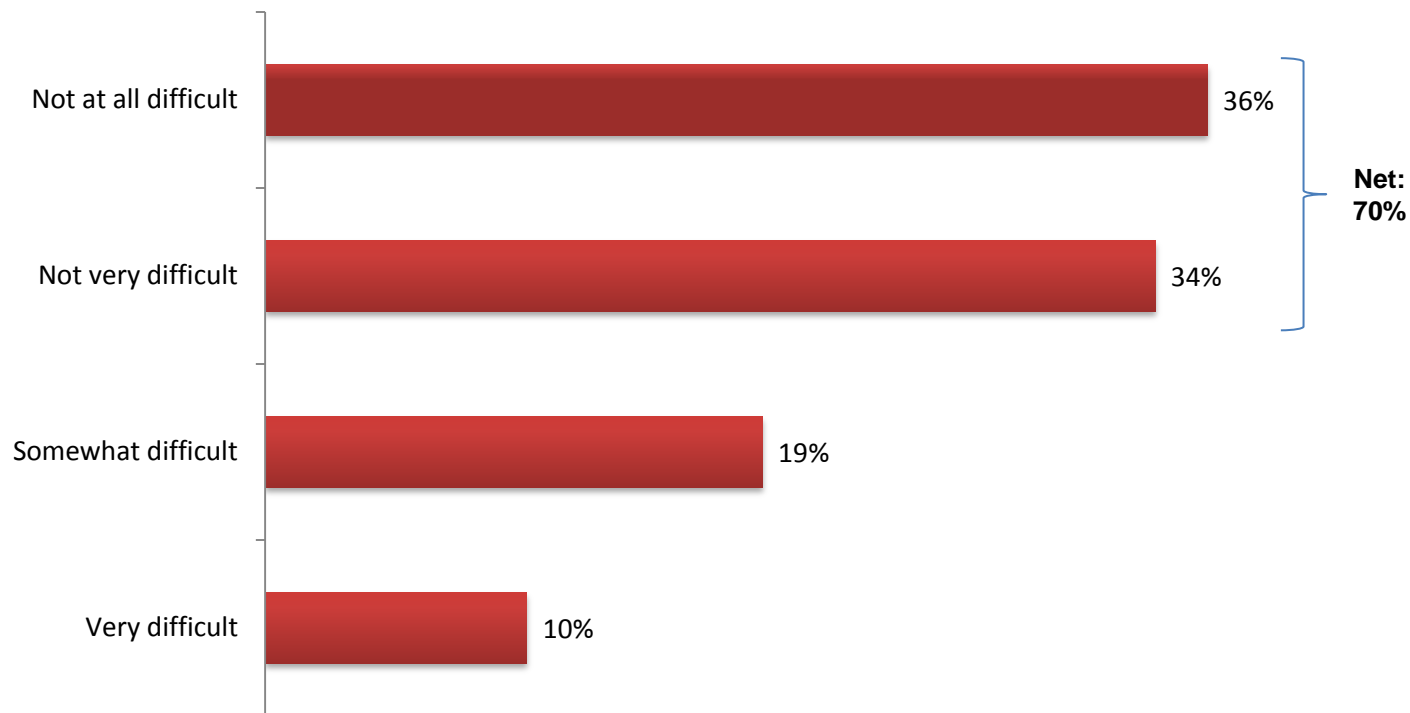
49

ACCESS TO FACILITIES

Seventy percent of caregivers do not have difficulty finding healthcare facilities with adequate medical equipment close their residence.

Caregivers
generally have
few difficulties
finding
healthcare
facilities
nearby

How difficult was it for you to find healthcare facilities with adequate medical equipment close to your dependent's residence?





DETAILED ANALYSIS OF RESULTS

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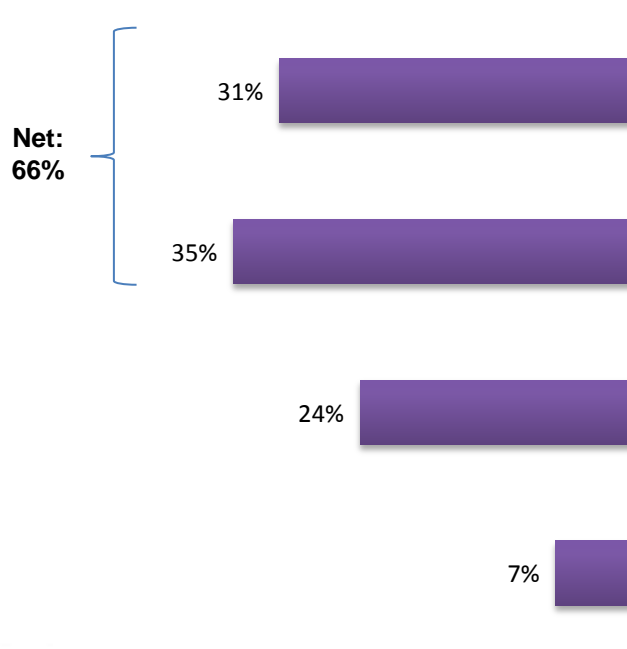
GOVERNMENT COVERAGE

Caregivers are split on their experiences with public health coverage

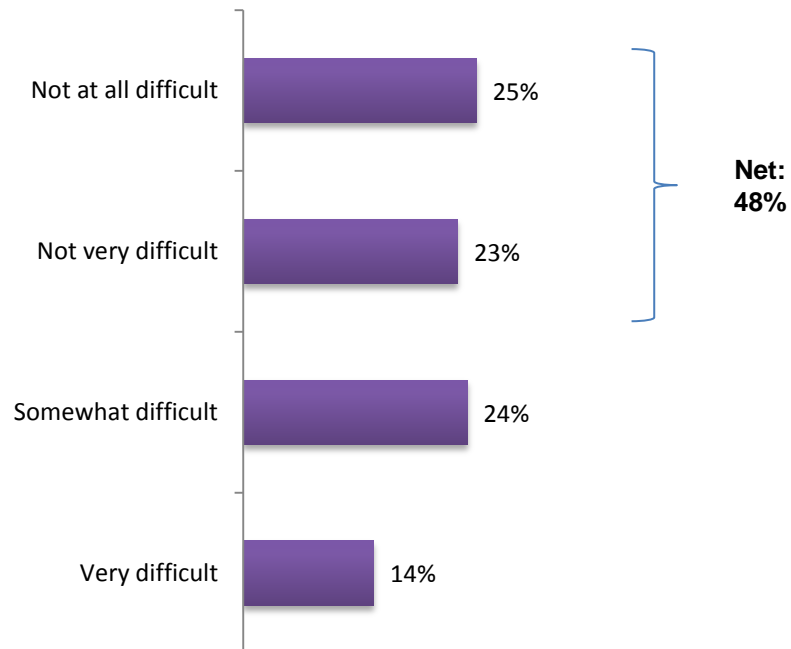
Caregivers are more split than patients on whether or not it is difficult to obtain adequate provincial benefits and insurance to cover their costs. **Forty-eight percent characterize the experience as not difficult, while 38% find it difficult.** Those who are open to supplemental treatment supplied by a private business are more likely to find obtaining provincial coverage difficult (44% vs. 22% not likely to use).

Two thirds of caregivers do not find it difficult to help their dependents access the most current/effective treatment options available through public health coverage; however, those likely to use private services are more likely to find it difficult (37% vs. 15% not likely).

How difficult was it for you to access the most current/effective treatment options available through public health coverage?



How difficult was it for you to obtain adequate provincial benefits and insurance to cover treatment costs?





DETAILED ANALYSIS OF RESULTS

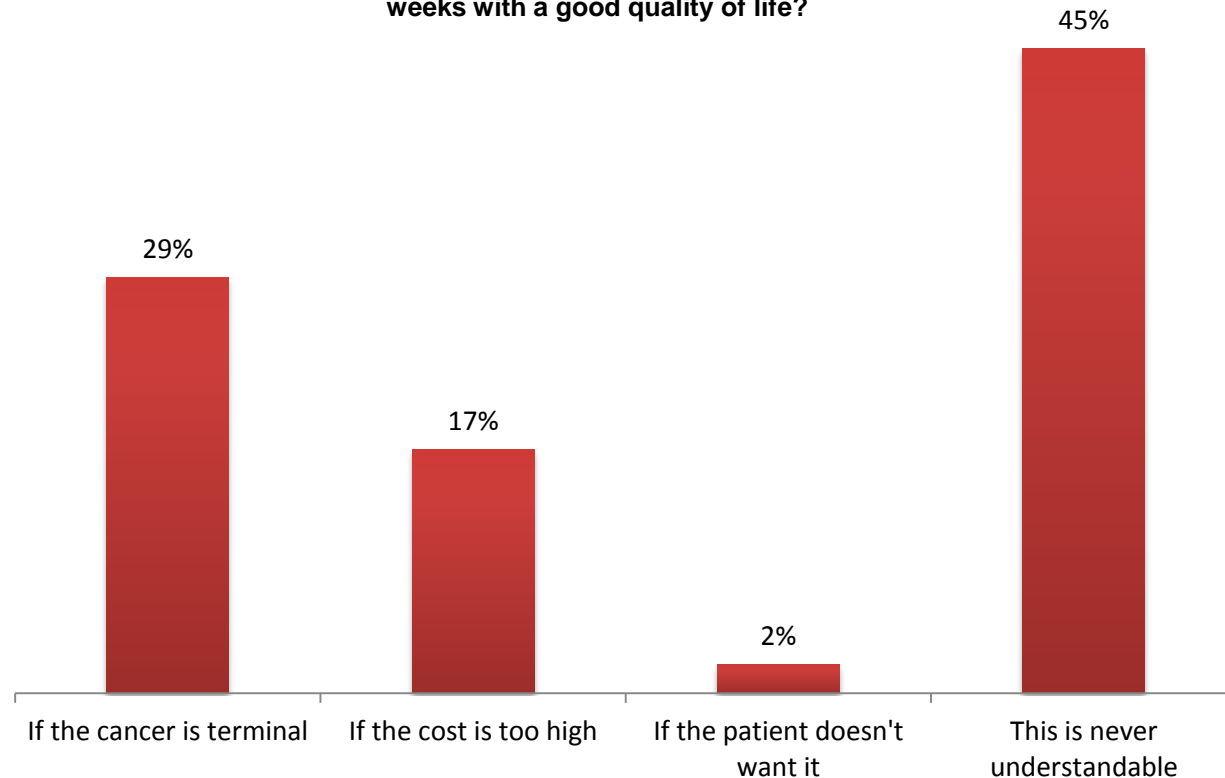
51

GOVERNMENT COVERAGE RESPONSIBILITY

Forty-five percent of caregivers believe that it is never understandable for the government to not provide life-prolonging treatment to a cancer patient.

When is it understandable for the government not to provide treatments that can prolong a cancer patient's life by only a few weeks with a good quality of life?

Three in ten caregivers believe it is understandable for the government not to provide treatments when a patient's cancer is terminal





DETAILED ANALYSIS OF RESULTS

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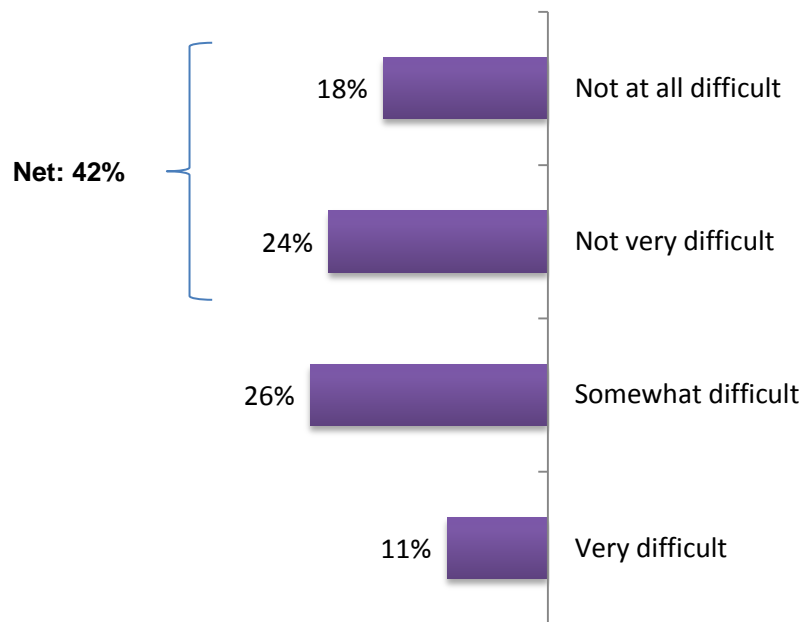
PRIVATE COVERAGE OPTIONS

Caregivers
faced difficulty
acquiring private
coverage for
their dependents

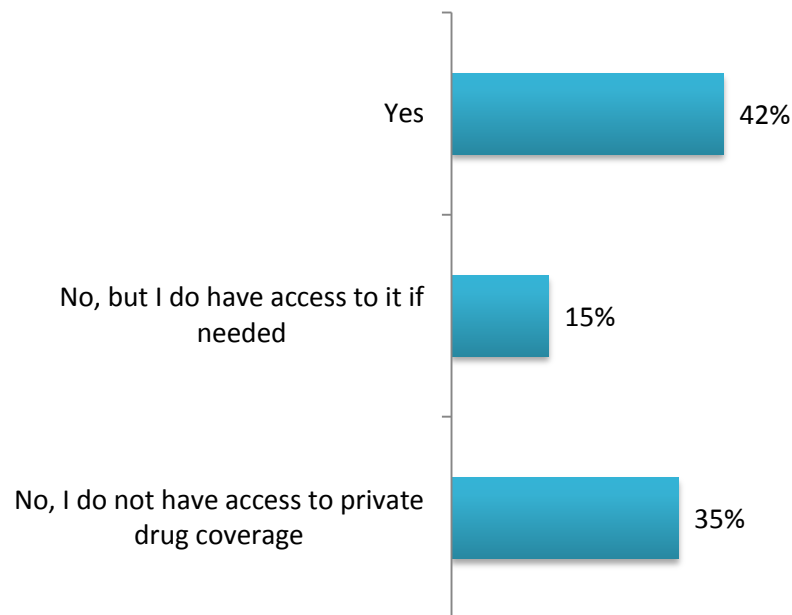
Caregivers report having a harder time acquiring adequate private benefits and insurance than patients; while **42% have little to no difficulties**, **37% had trouble obtaining coverage** for their dependent.

Two in five caregivers say their dependents made use of private drug coverage for their treatment, while 35% report having no access at all.

How difficult was it for you to obtain adequate private benefits and insurance to cover treatment costs?



Have you accessed private drug coverage for your cancer treatment?





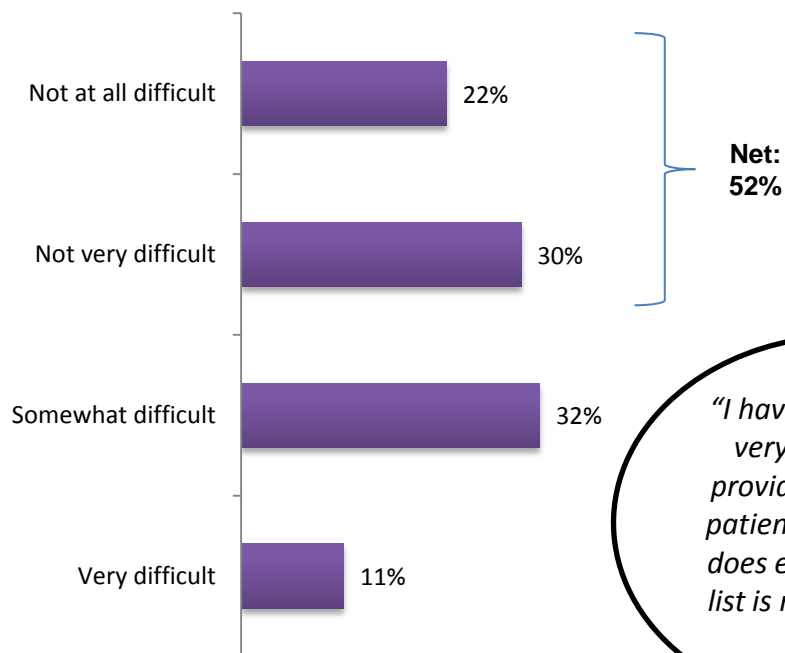
DETAILED ANALYSIS OF RESULTS

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SOURCES OF SUPPORT

Half of caregivers do not find it difficult to obtain adequate emotional or psychological support. They report mixed experiences with health and home care medical teams, but are largely appreciative of any support that is offered.

How difficult was it for you to obtain adequate emotional/psychological support?



"Money was tight. I had to leave school to support the house."

"The patient is currently on a trial drug financed by the drug company."

"We were helped by a hospital staff member whose entire role was to find funding for patients who did not have private health insurance."

"I have found there is very little support provided for out-care patients, and where it does exist the waiting list is months to years long."

"Good palliative care from the nurses, great co-operation from the hospital, and exceptional help from the VON."

"My employer's extended medical care program was of great help."



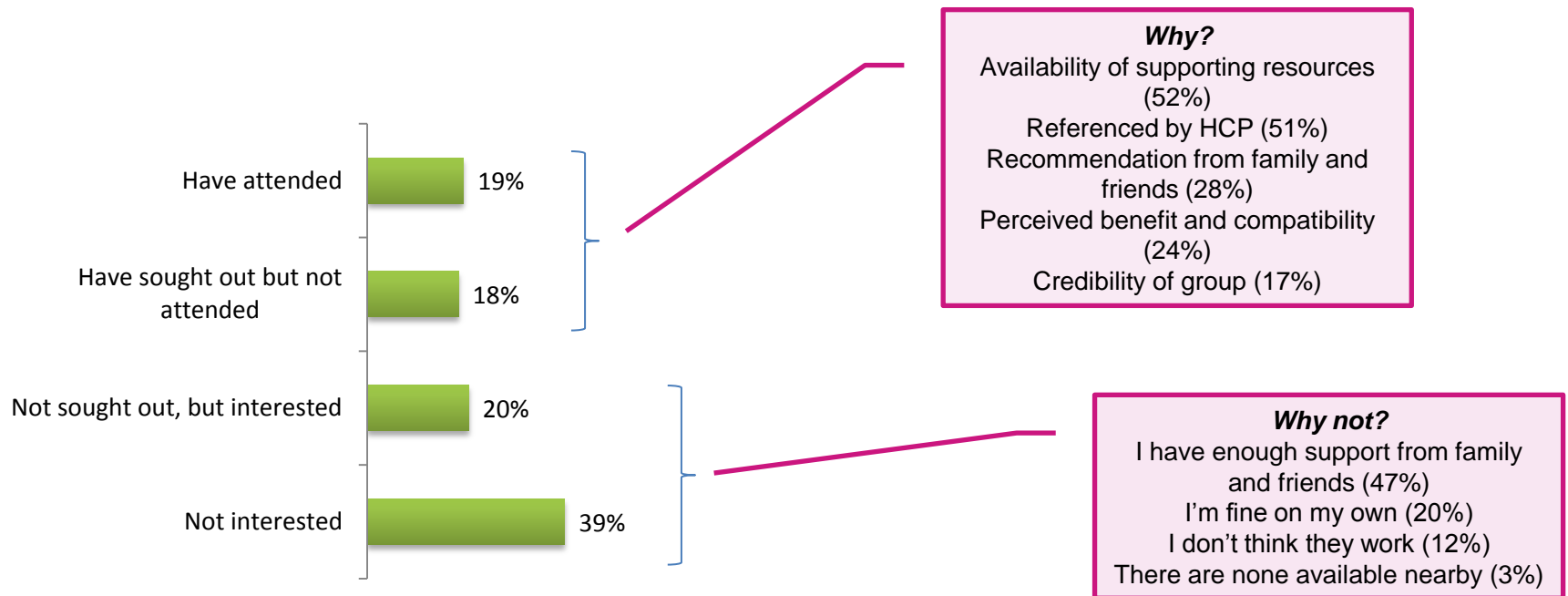
DETAILED ANALYSIS OF RESULTS

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SOURCES OF SUPPORT, CONTINUED

Like patients, many **caregivers are not interested in a support group** (39%), and **only 19% have ever attended one**. The likelihood of caregivers taking advantage of such groups depends on their local availability, and on a recommendation from a healthcare professional. Those who are not interested say it is because they have enough support from family and friends (47%), or are fine on their own (20%).

Have you ever sought out or attended any patient/caregiver support groups?





DETAILED ANALYSIS OF RESULTS

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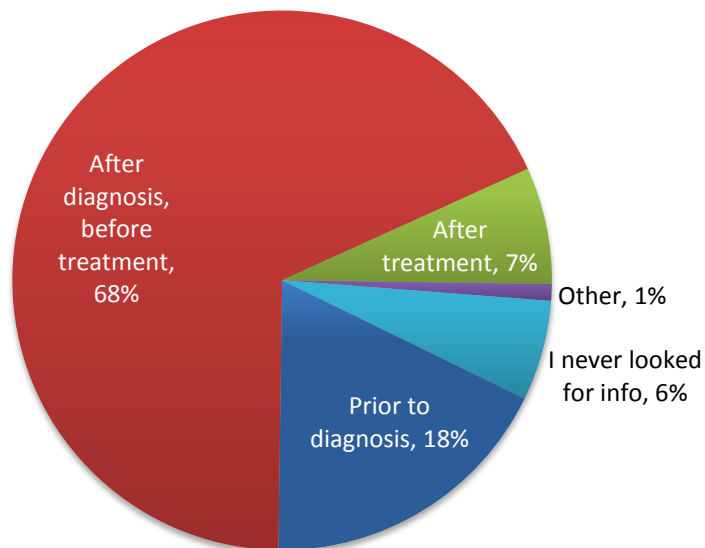
INFORMATION AND EDUCATION

Three quarters
of caregivers
have little
problem
accessing
information

Three quarters of caregivers do not find it difficult to access education on cancer prevention/treatment.

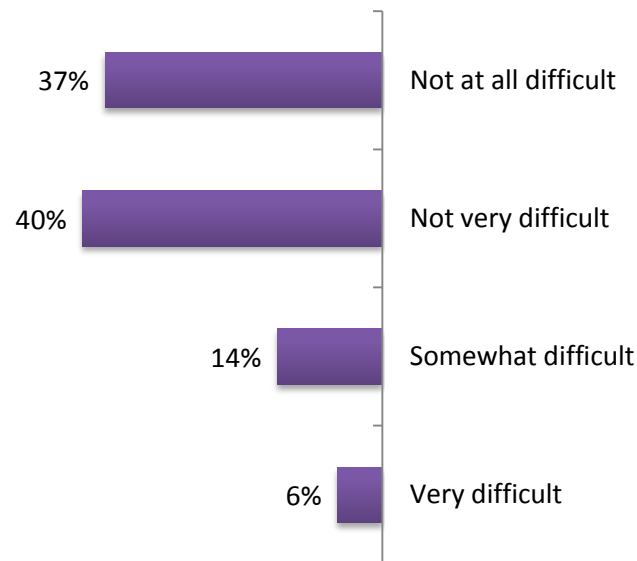
Two thirds began looking for information about their dependent's condition after their diagnosis but before treatment began.

When did you begin looking for information about your dependent's condition?



How difficult was it for you to access education on cancer prevention/treatment?

**Net:
77%**





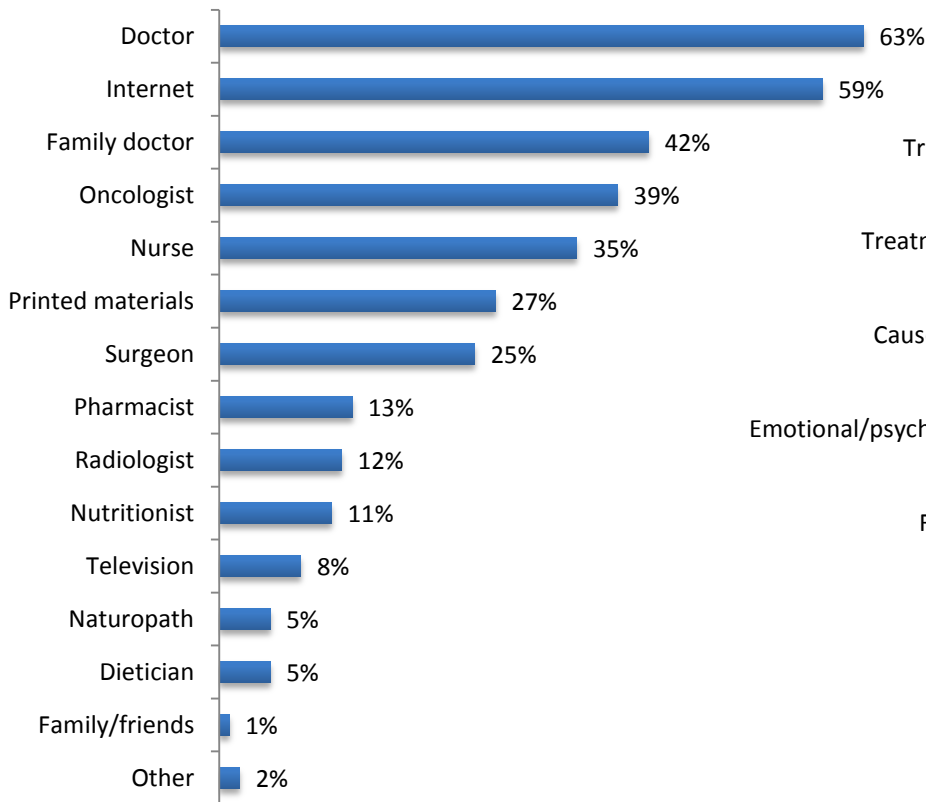
DETAILED ANALYSIS OF RESULTS

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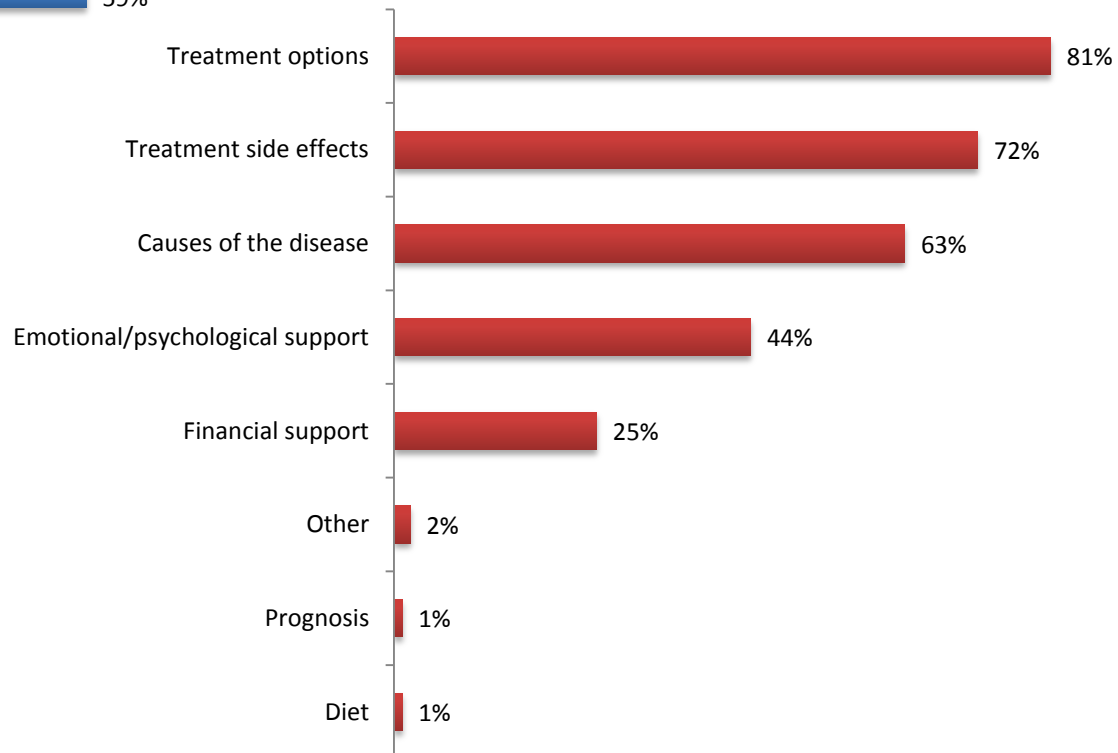
INFORMATION AND EDUCATION, CONTINUED

Most caregivers go to a doctor (63%) or the internet (59%) when looking for information, where they seek out treatment options (81%), followed by side effects (72%) and causes of the disease (63%).

Who/where have you gone for information?



What information have you sought out?





DETAILED ANALYSIS OF RESULTS

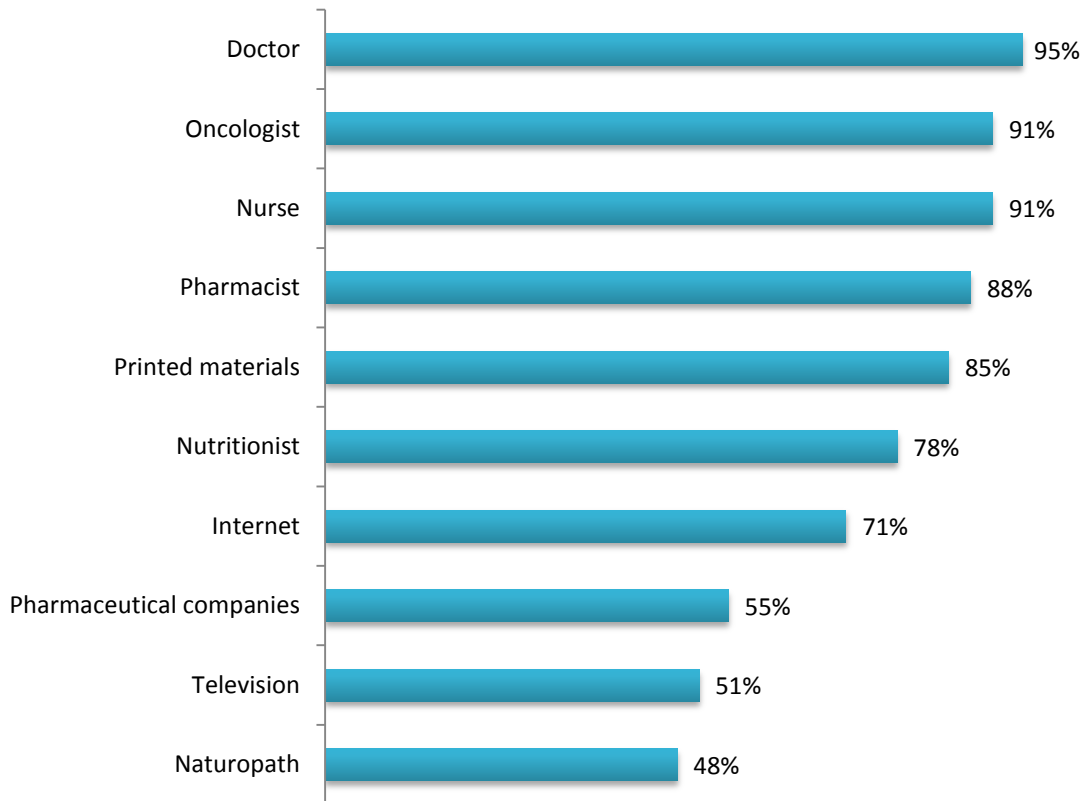
57

Caregivers are more likely than patients to find pharmaceutical companies credible

CREDIBILITY OF INFORMATION SOURCES

Caregivers find doctors to be the most credible source of information (95%), followed by nurses and oncologists (91% each), and pharmacists (88%). While 71% believe the internet to be a credible source of information, 45% of caregivers do not know how to determine if a website is reliable.

How credible do you find each of the following sources to be?



How do you determine if a website is reliable?





DETAILED ANALYSIS OF RESULTS

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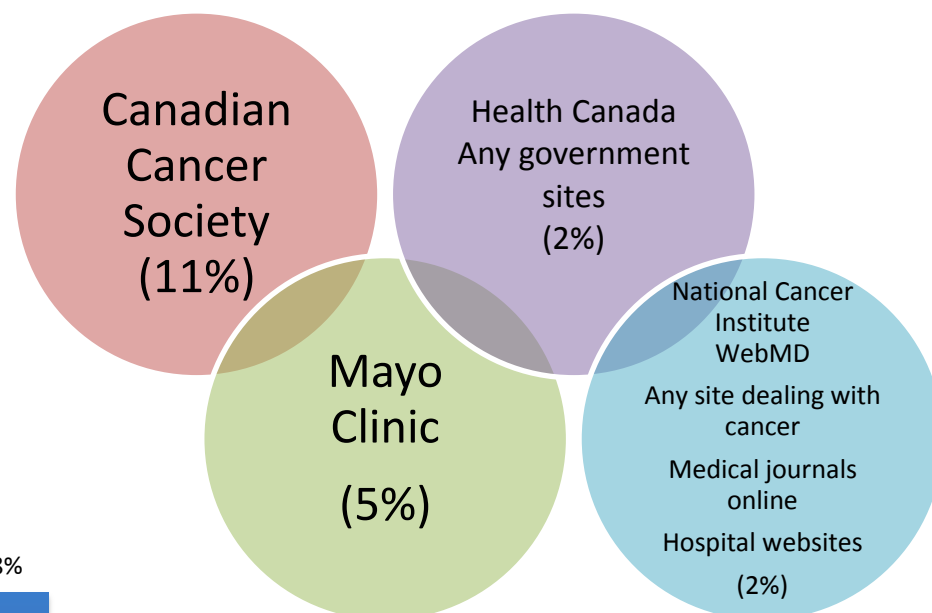
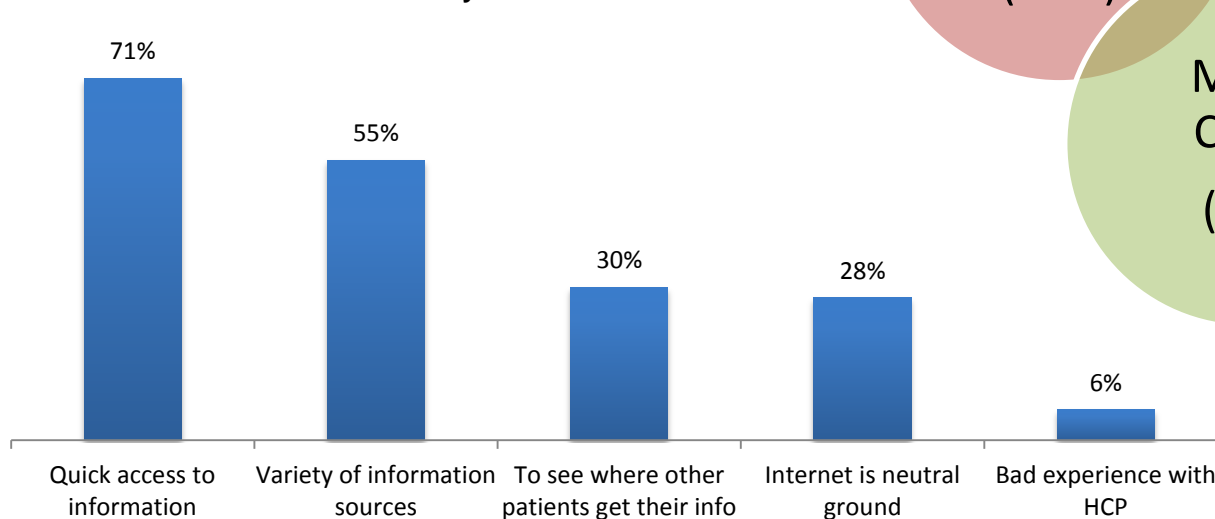
INTERNET AS SOURCE

Caregivers and patients tend to see out the same sources online

Like patients, caregivers choose to visit the sites of government, hospital, or cancer groups – such as the Canadian Cancer Society, the Mayo Clinic, or Health Canada. They **prefer to consult the internet when they need quick access to information**, or want to see a variety of sources.

Are there specific websites that stand out in your mind as having been particularly useful and reliable?

For what reasons do you consult the internet?





DETAILED ANALYSIS OF RESULTS

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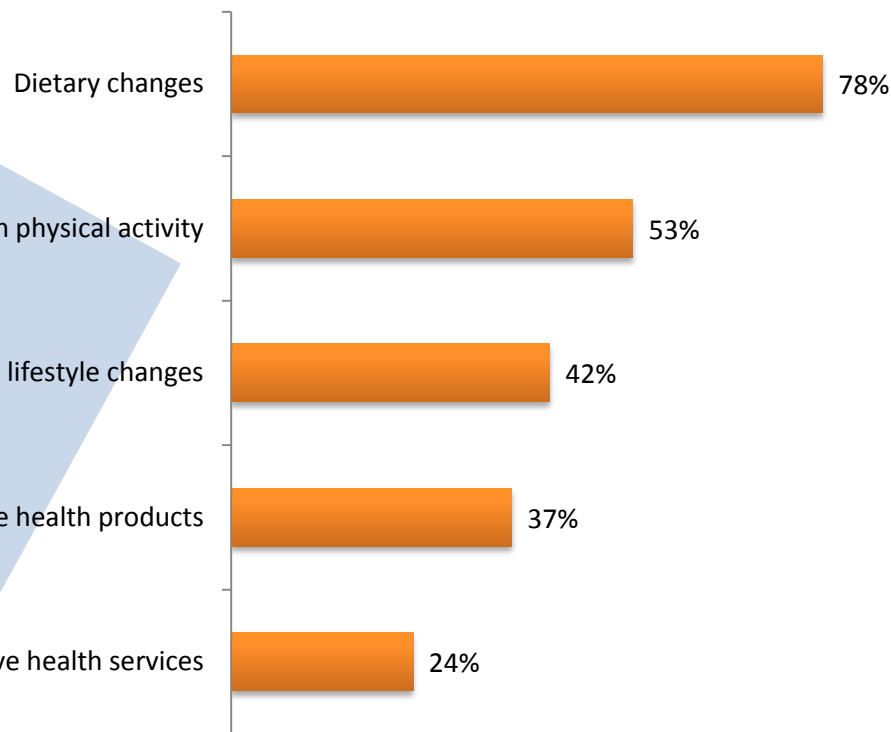
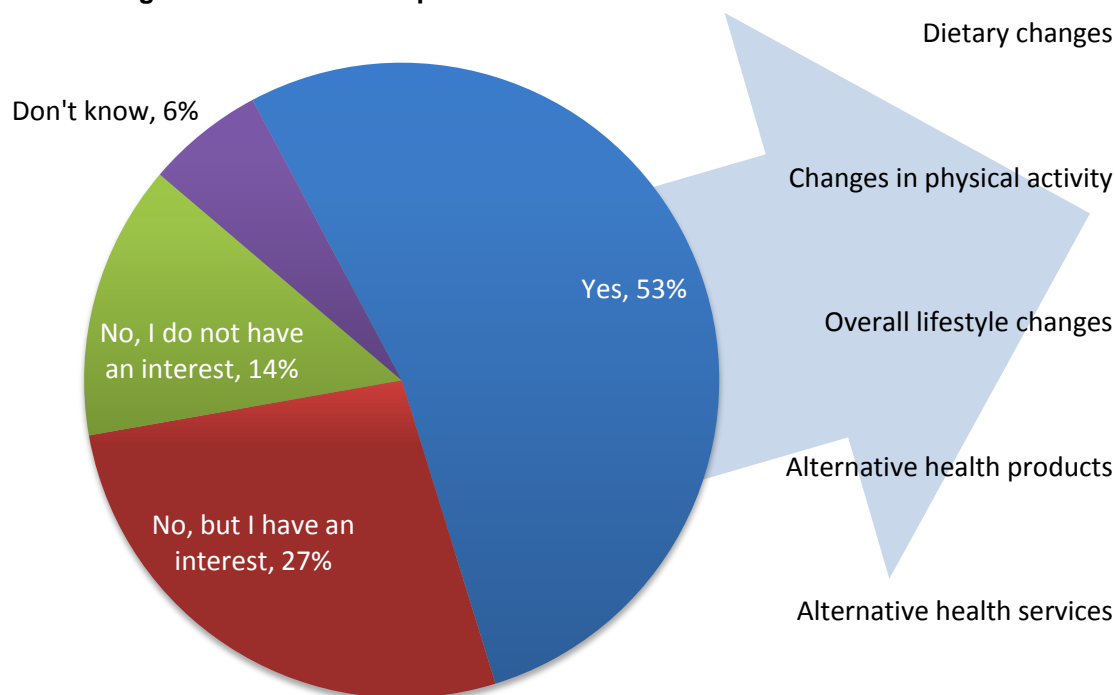
ALTERNATIVE HEALTHCARE OPTIONS

Half of caregivers have looked at alternative healthcare options

Approximately **half of caregivers have looked for information on lifestyle changes or alternative health products** to complement their dependents' treatment, compared to only 41% of patients. Caregivers are looking for information on dietary changes (78%), changes in physical activity (53%), or overall lifestyle changes (42%).

What type of information did you look for?

Have you looked for any information on lifestyle changes/alternative health products or services?



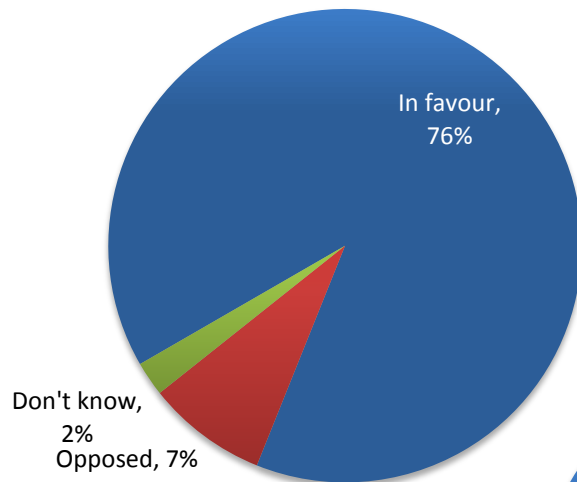


DETAILED ANALYSIS OF RESULTS

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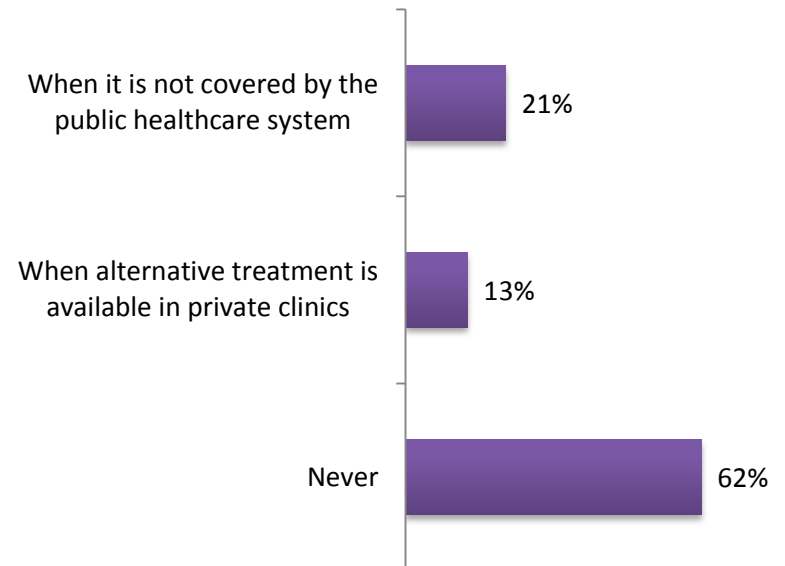
OPENNESS TO PRIVATE SERVICES

Are you in favour or opposed to out-of-hospital care?

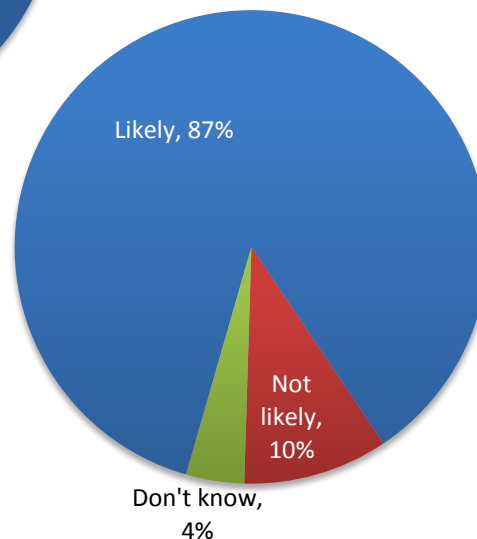


Three quarters of caregivers are in favour of out-of-hospital care for cancer patients, and 87% say their dependent would be likely to take advantage of the option of receiving treatment at home. However, **62% of caregivers believe a patient should never have to pay for services out-of-pocket** – the same share as patients themselves.

When does it make sense for a patient to pay for health care out of pocket?



If your dependent had the option of receiving treatment at home, how likely would they be to use this service?





DETAILED ANALYSIS OF RESULTS

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OPENNESS TO PRIVATE SERVICES, CONTINUED

Caregivers are more willing to pay for supplementary care services than patients

Eighty-seven percent of caregivers say they are likely to take advantage of a service where they can connect with oncology nurses over the phone. When asked if they would pay for such a service, only 43% were willing to do so – however this is **significantly more than the number of patients willing to pay**. Caregivers are **also more open to a private business that offers supplemental services** designed to enhance traditional healthcare – 71% are likely to utilize such a business, compared to 52% of patients.

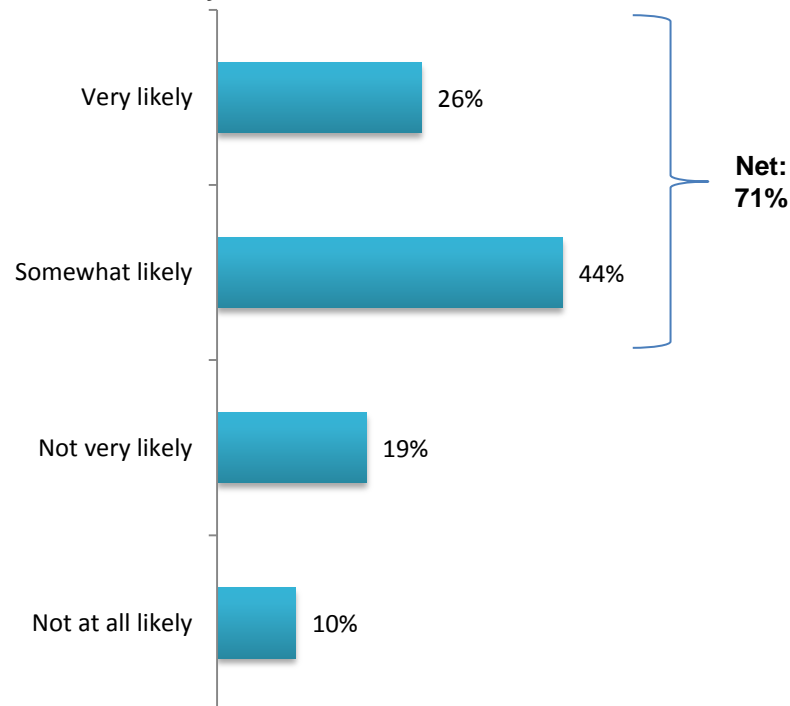
If you had access to experienced oncology nurses over the phone, how likely would you be to use/pay for this service?



87% likely to use service

43% willing to pay for service

If a private business was offering wellness services designed to enhance and not replace traditional healthcare, how likely would you be to use these services?





DETAILED ANALYSIS OF RESULTS

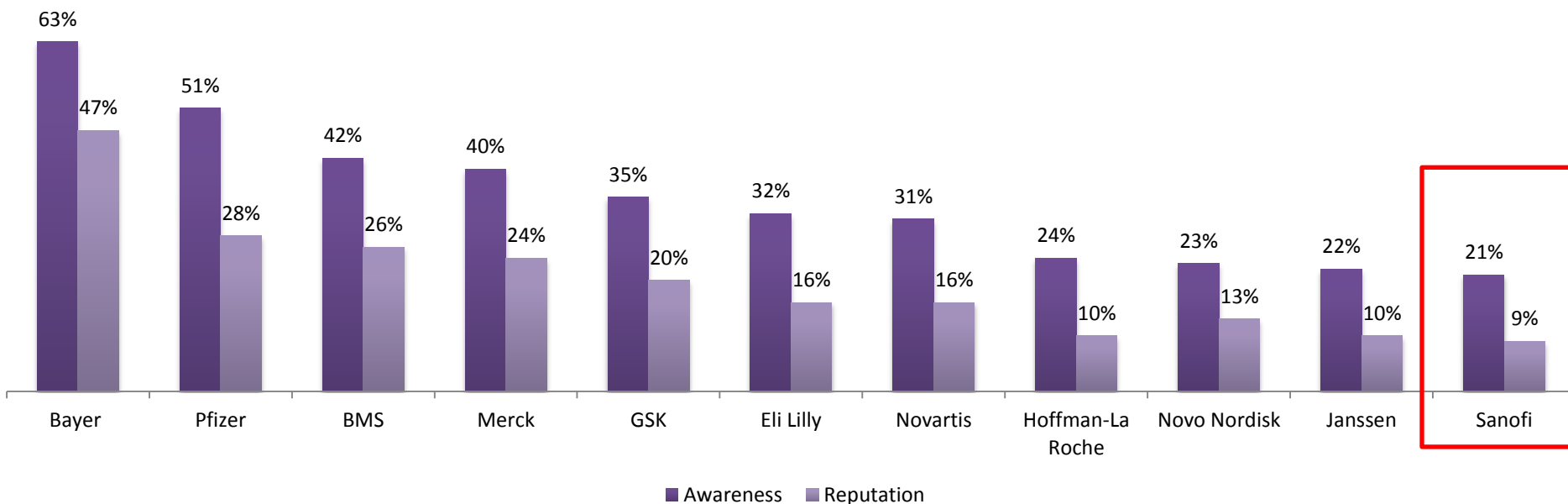
62

FAMILIARITY WITH PHARMACEUTICAL COMPANIES

Caregivers are more aware of Sanofi than patients are

Awareness of pharmaceutical companies is somewhat low among caregivers, with Bayer (63%) and Pfizer (51%) being the most recognized. **More caregivers are aware of Sanofi than patients** (21% vs. 8% patients), and give the company a significantly higher reputation score.

Do you have a good opinion, bad opinion, or you don't know the following companies?





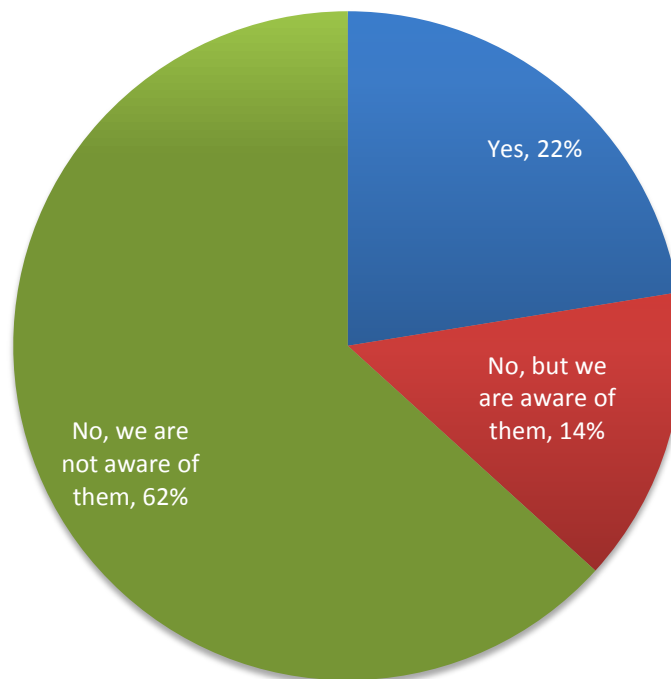
DETAILED ANALYSIS OF RESULTS

USE OF SERVICES PROVIDED BY PHARMACEUTICAL COMPANIES

Fifty-five percent of caregivers find pharmaceutical companies to be credible sources of information. Yet **only 22% of caregivers have taken advantage of supplemental services offered by pharmaceutical companies**; 62% are unaware such services existed.

Caregivers are more likely to be aware of these services than patients are

Have you ever received any of these free supplementary services?





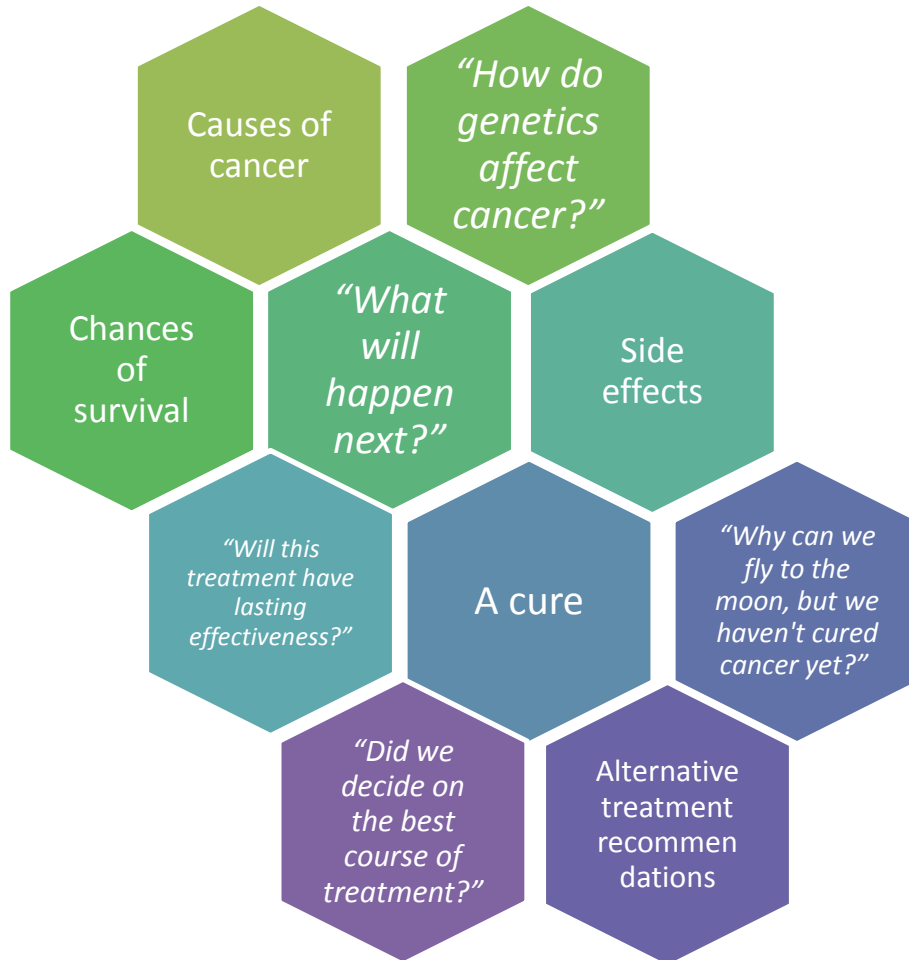
DETAILED ANALYSIS OF RESULTS

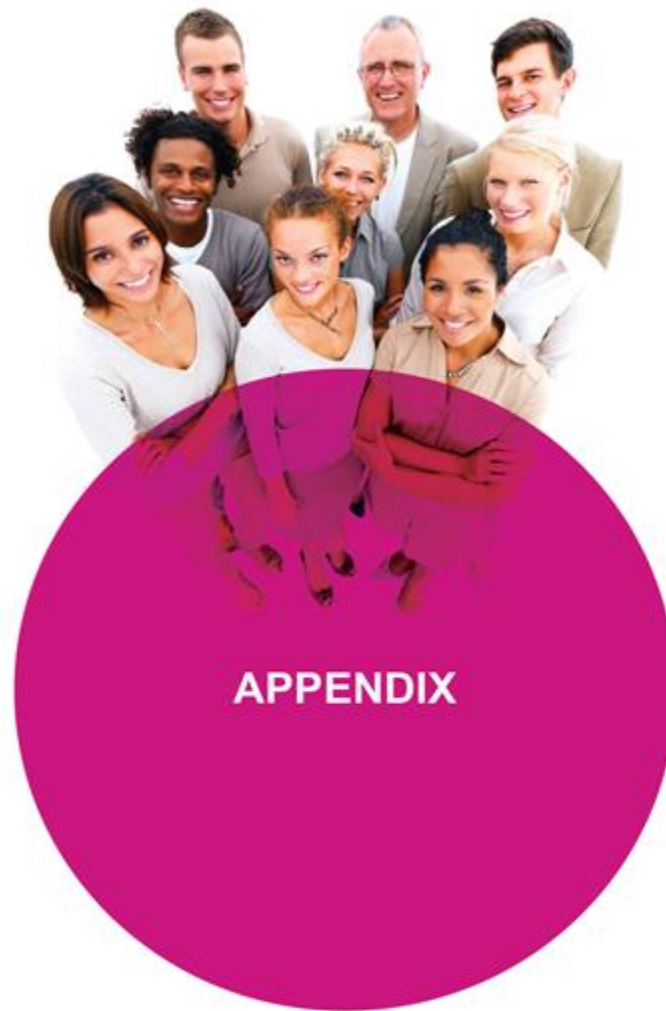
64

UNANSWERED QUESTIONS

Most caregivers say they do not have unanswered questions, or have questions that cannot be answered.

Some are interested in alternative treatment recommendations, causes of cancer, or the chances of their dependent's survival.



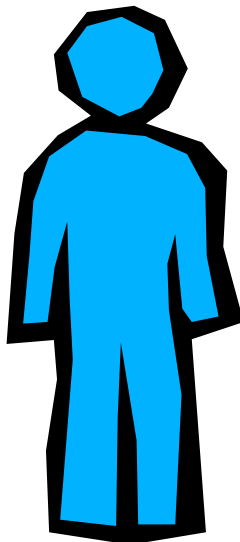




GENDER

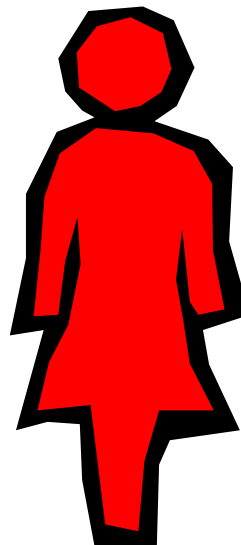
Patients: 50%

Caregivers: 37%



Patients: 50%

Caregivers: 63%





AGE

	18-24	25-34	35-44	45-54	55-64	65-74	75+
Patients	1%	3%	6%	15%	29%	34%	12%
Caregivers	17%	14%	14%	23%	17%	11%	3%



