

April 2021

Lung Cancer Policymaker Polling

AstraZeneca 

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Agenda

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x. Methodology

Methodology

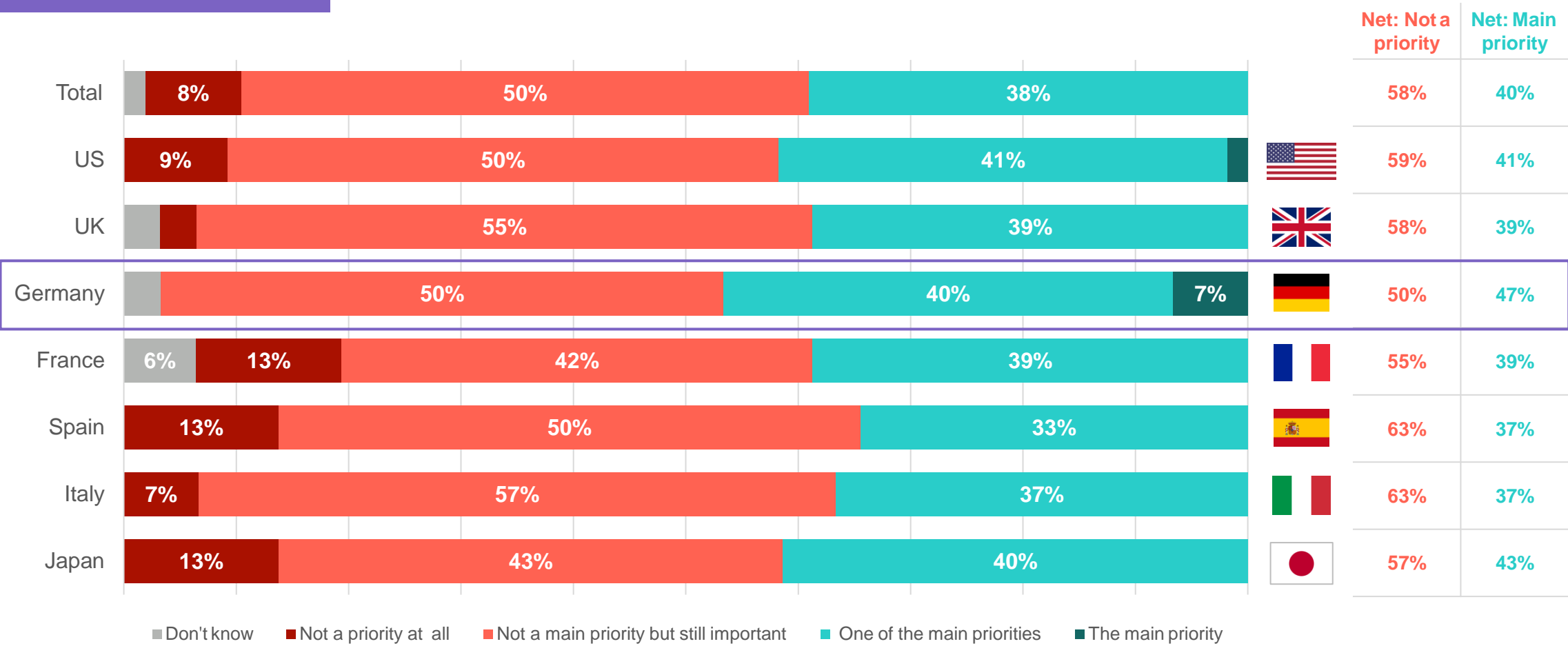
What?	8-10 minute online survey administered by telephone
Who?	214 policy decision-makers in Government & Public sector organisations
Where?	US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)
When?	18 th – 29 th March 2021

1a. Cancer screening

Policymakers are relatively split in terms of how much of a priority they consider cancer screening post-COVID to be. Policymakers in Germany are most likely to consider it a priority.

Cancer screening investment

S1. How much of a priority is investment in cancer screening in the post-COVID recovery in your country?



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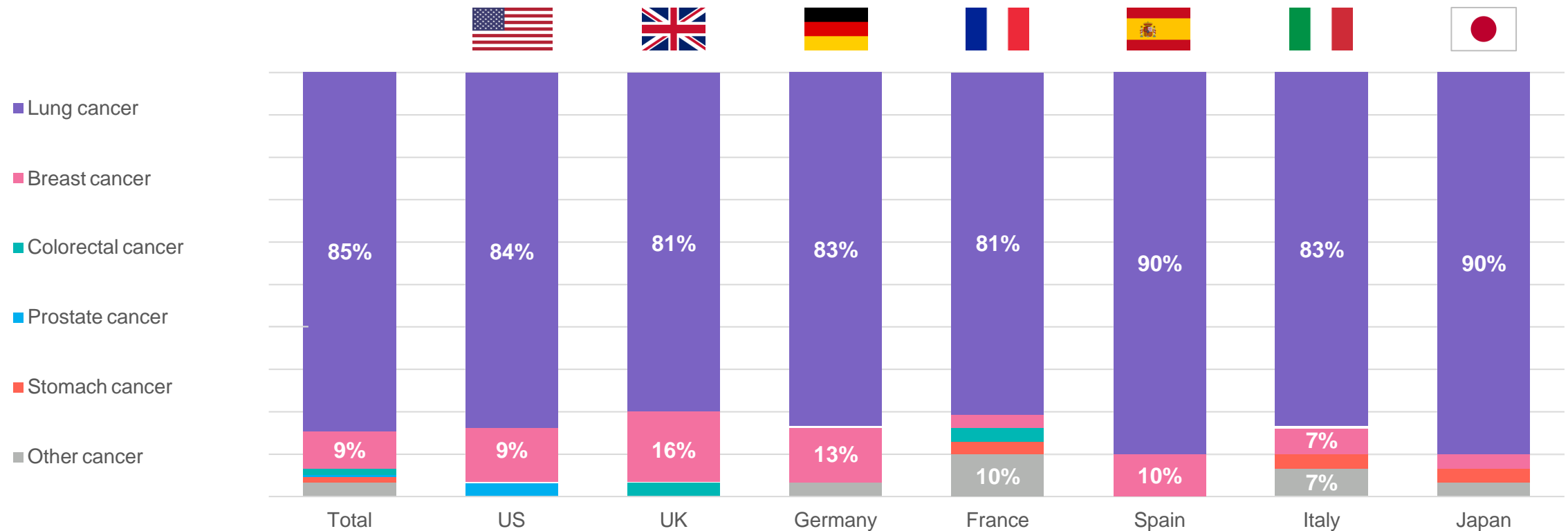
Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

1b. Cancer awareness

The vast majority of policymakers surveyed were able to correctly identify lung cancer as the leading cause of cancer deaths globally.

Leading cause of cancer death

Q1. Which cancer do you think is the leading cause of cancer deaths globally?



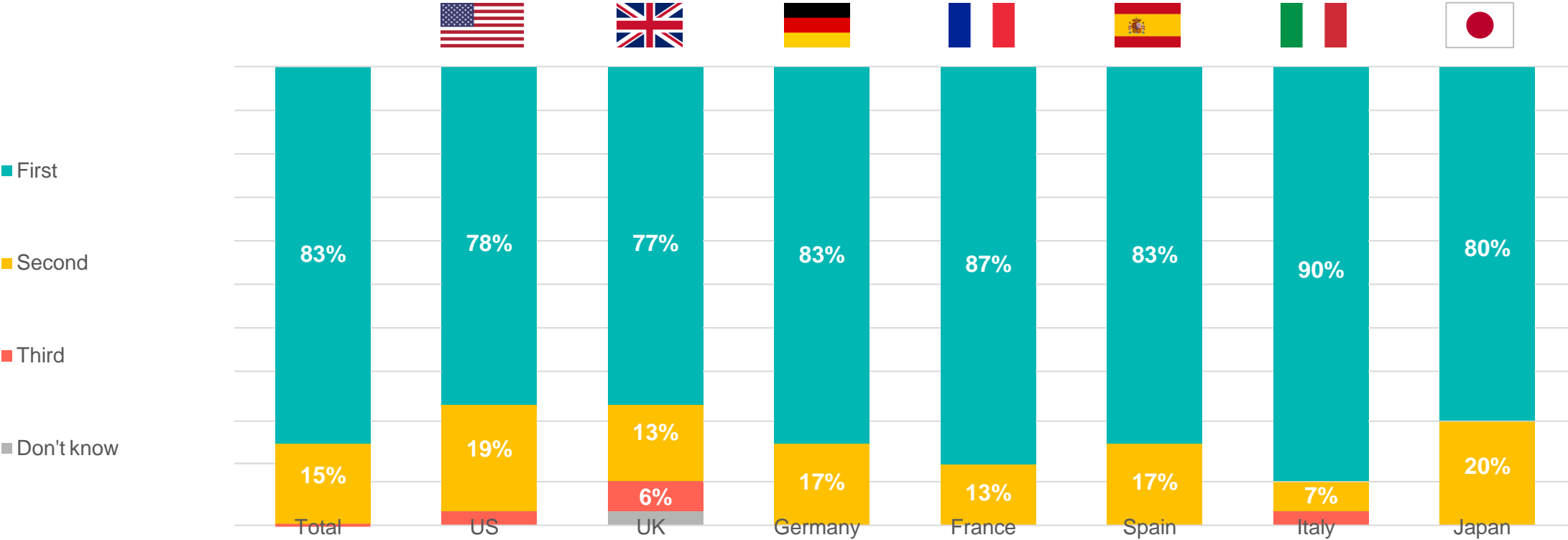
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2a. Lung cancer knowledge

When prompted, policymakers are also able to identify lung cancer as the top cause of cancer deaths in their country. This was the case across all markets surveyed.

Top causes of cancer deaths

Q2. Among the following causes of cancer deaths in your country, what place do you think lung cancer holds in terms of top causes of cancer deaths?



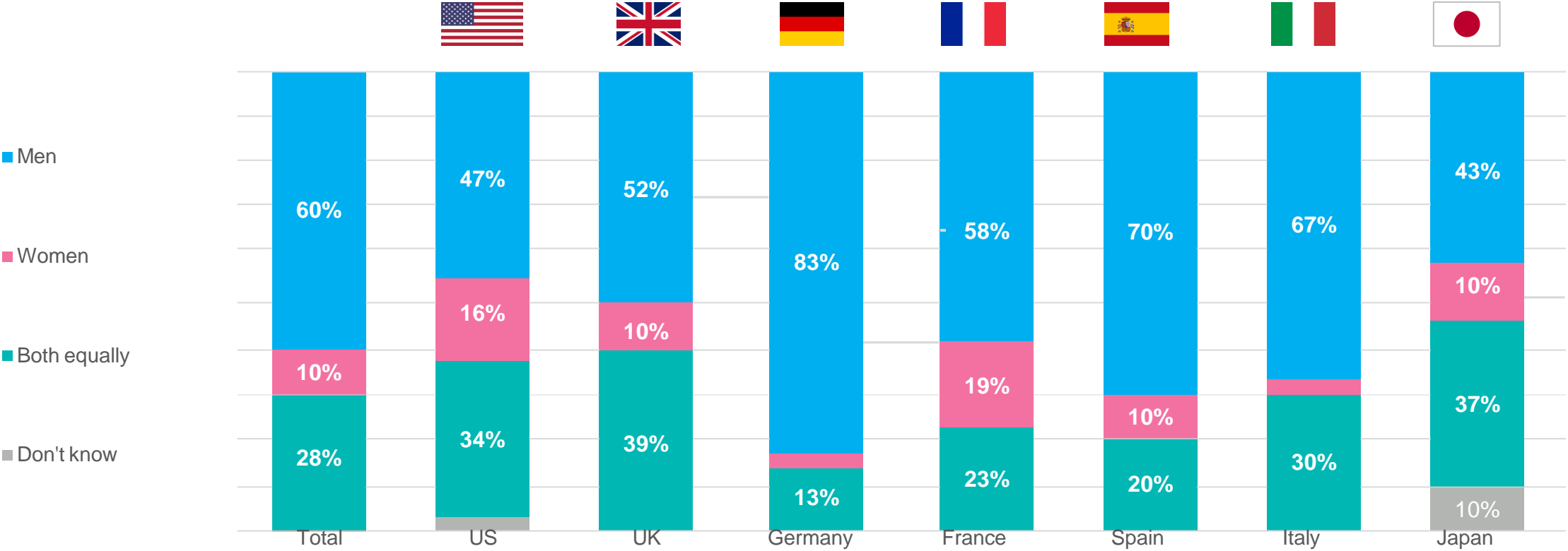
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Policymakers across all countries are more likely to think that lung cancer mostly affects men, though there are some countries where a sizeable proportion think it affects both equally (UK, US, Italy and Japan).

Lung cancer and gender

Q3. Do you think lung cancer mostly affects men, women or both equally?



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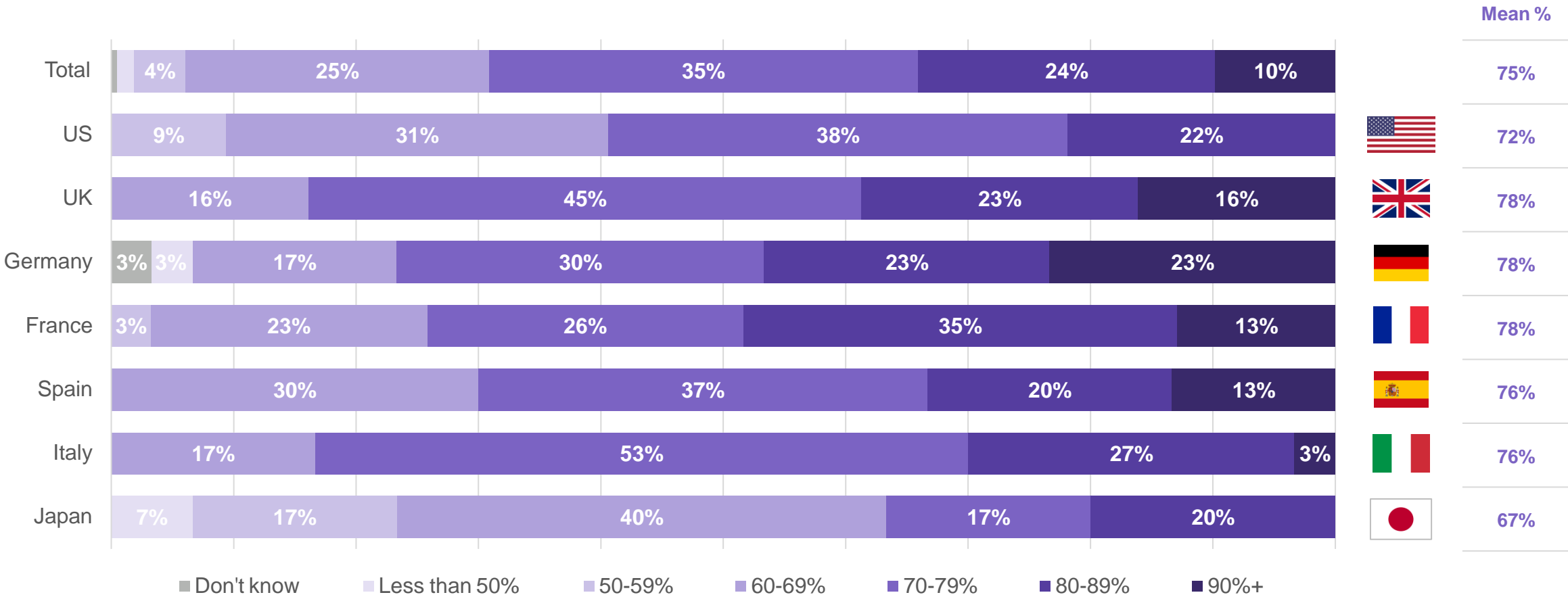
Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

2b. Lung cancer links to smoking

At an average level, policymakers are in broad agreement that approximately three quarters of lung cancers in their country are linked to smoking (though there is some variance on the exact percentage bands selected).

Lung cancer in smokers

Q4. What percentage of lung cancers in your country do you think are linked to smoking?

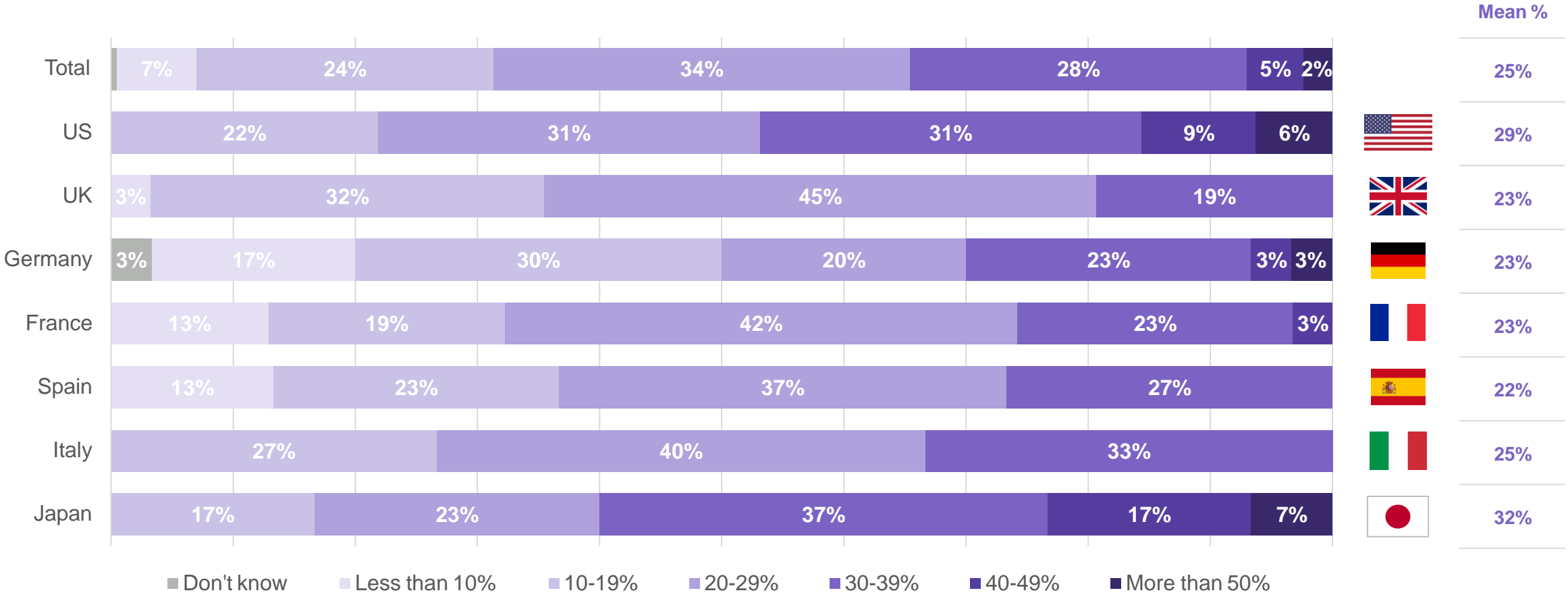


Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

On average, policymakers think that approximately a quarter of lung cancer cases in their country occur in non-smokers. Policymakers in the US and Japan cite a higher proportion but the market-by-market picture is stable.

Lung cancer in non-smokers

Q4b. What percentage of lung cancer cases in your country do you think occur in non-smokers?



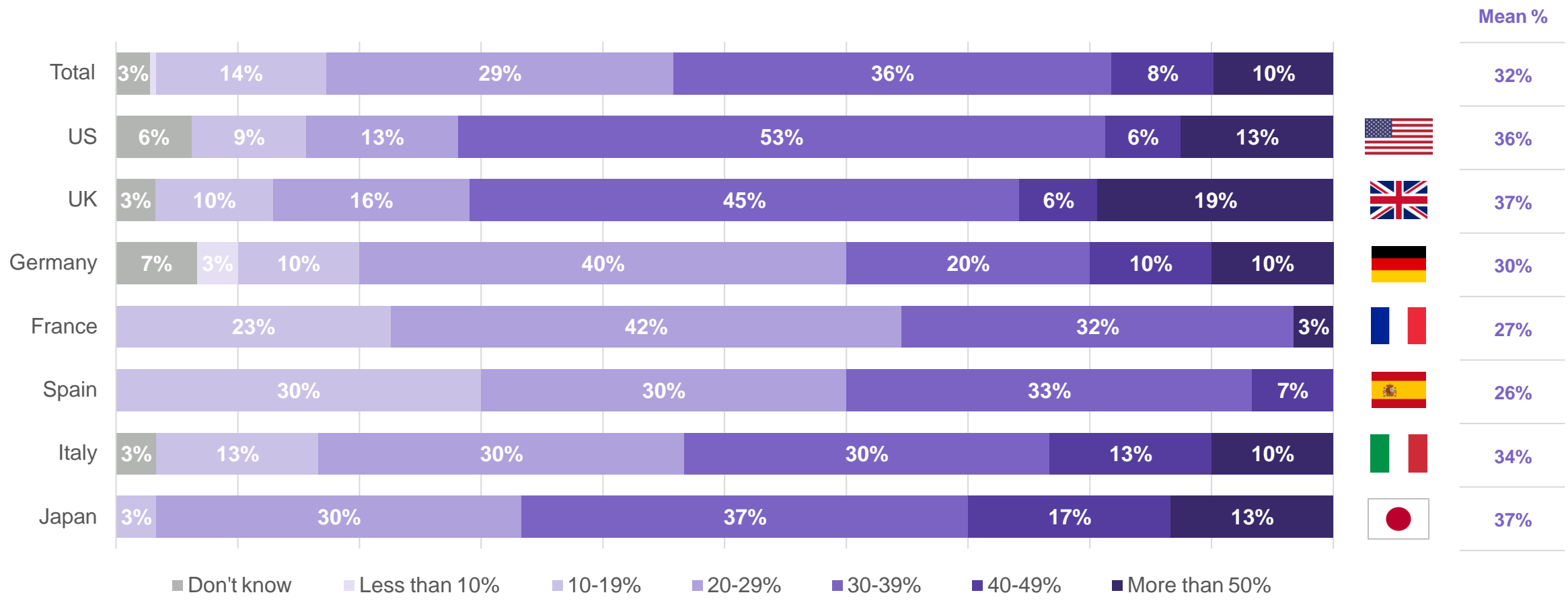
Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

2c. Lung cancer survival rates

Policymakers tend to think that a third of people will survive up to 5 years from lung cancer. There is variation by market with those in the UK, US and Japan believing the proportion to be slightly higher.

Lung cancer survival

Q5. What percentage of people do you think survive up to 5 years from lung cancer?

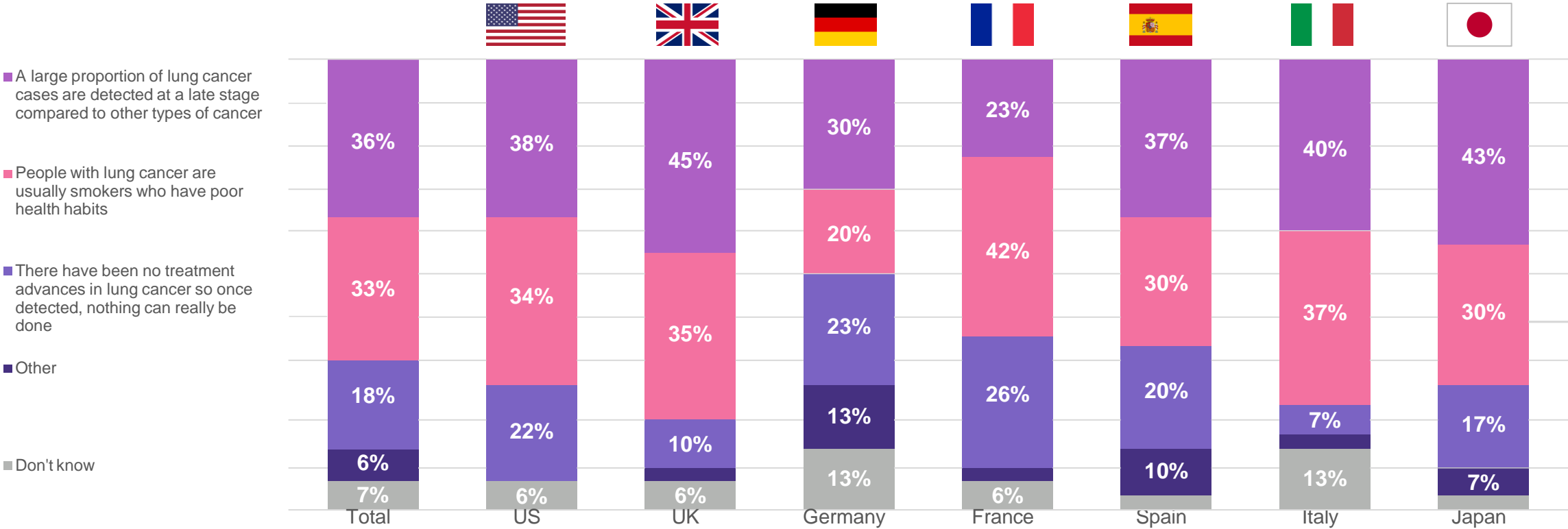


Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

Policymakers are split on why lung cancer survival rates are lower than those of other cancers. Although there are variations by country, the general consensus is that this is due to late detection and poor health habits.

Lung cancer survival rates

Q6. Survival rates for lung cancer are much worse than for many other common forms of cancer. Which of the following reasons best describe why you think this is? *Please select one.*



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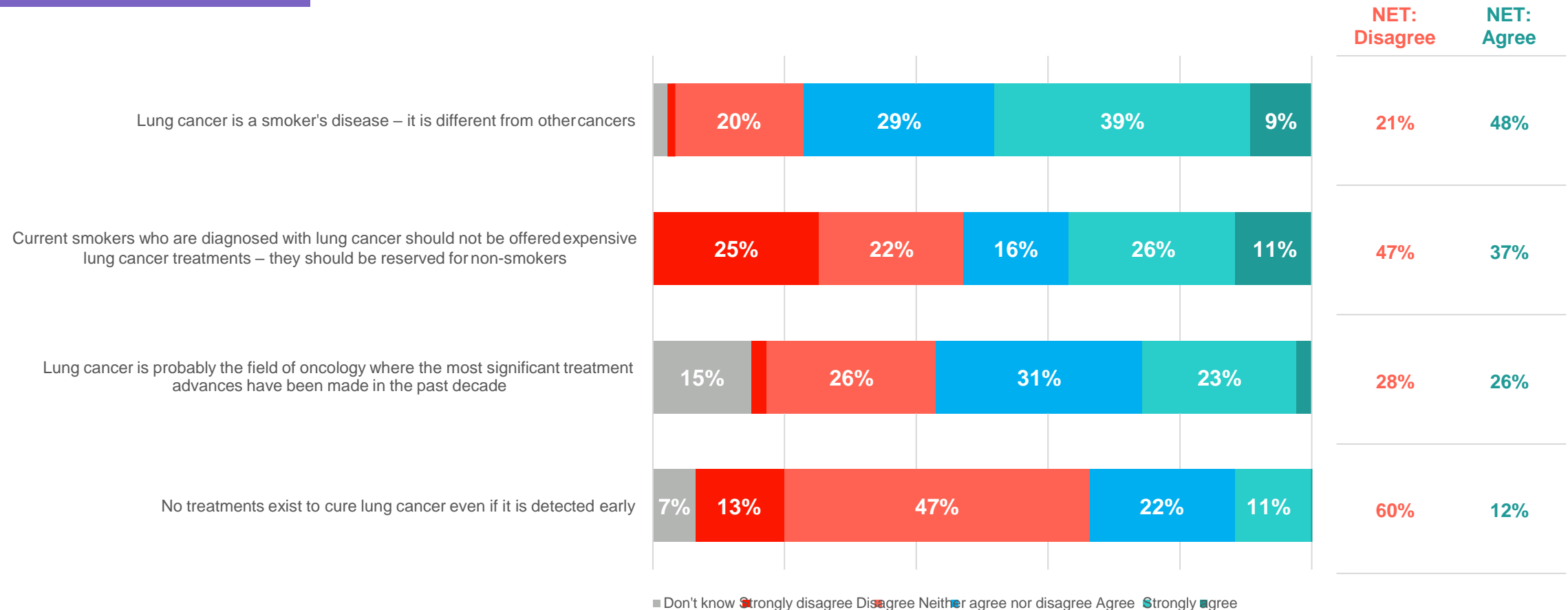


2d. Attitudes towards lung cancer

Policymakers are most likely to agree that lung cancer is a smoker's disease but they are hopeful – the majority *disagree* that there are no treatments available to cure lung cancer.

Lung cancer attitudes

Q7. To what extent, if at all, do you agree or disagree with each of the following statements?










The view that lung cancer is a smoker's disease is the one that policymakers agree with most across all countries except for Japan where there is a higher proportion of policymakers believing that smokers should not be offered expensive treatment.

Lung cancer statements

Q7. To what extent, if at all, do you agree or disagree with each of the following statements?

NET: Agree








	Total							
Lung cancer is a smoker's disease – it is different from other cancers	48%	56%	55%	47%	48%	43%	47%	40%
Current smokers who are diagnosed with lung cancer should not be offered expensive lung cancer treatments – they should be reserved for non-smokers	37%	41%	32%	20%	45%	33%	37%	50%
Lung cancer is probably the field of oncology where the most significant treatment advances have been made in the past decade	26%	31%	32%	33%	16%	27%	23%	17%
No treatments exist to cure lung cancer even if it is detected early	12%	6%	10%	23%	13%	17%	7%	10%

Across all countries, policymakers are most likely to disagree that no treatments exist to cure lung cancer even if it is detected early.

Lung cancer statements

Q7. To what extent, if at all, do you agree or disagree with each of the following statements?

NET: Disagree

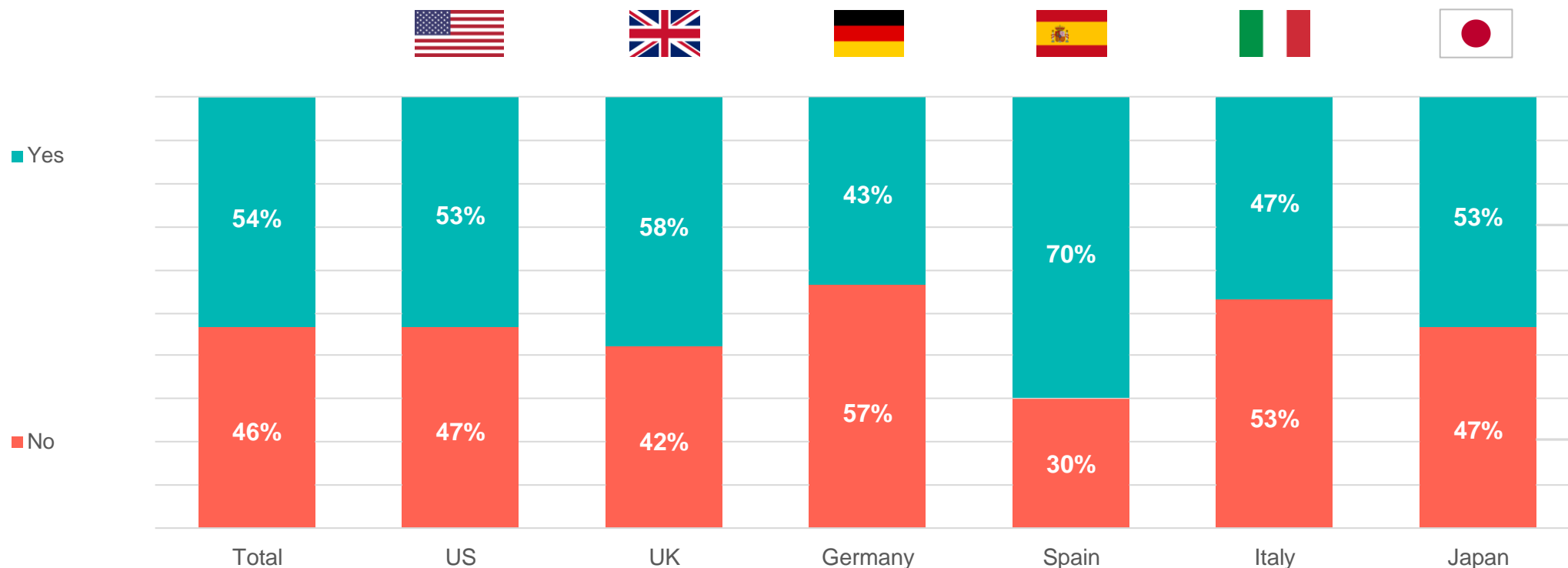
	Total							
No treatments exist to cure lung cancer even if it is detected early	60%	72%	58%	47%	58%	70%	67%	47%
Current smokers who are diagnosed with lung cancer should not be offered expensive lung cancer treatments – they should be reserved for non-smokers	47%	38%	52%	47%	42%	63%	53%	37%
Lung cancer is probably the field of oncology where the most significant treatment advances have been made in the past decade	28%	22%	29%	20%	35%	30%	23%	37%
Lung cancer is a smoker's disease – it is different from other cancers	21%	6%	23%	13%	26%	33%	17%	27%

3a. Lung cancer screening tools

Just over half of policymakers surveyed were aware of evidence that low-dose CT scans can act as a safe and effective screening tool. Awareness was highest in Spain and lowest in Germany.

Lung cancer screening tools

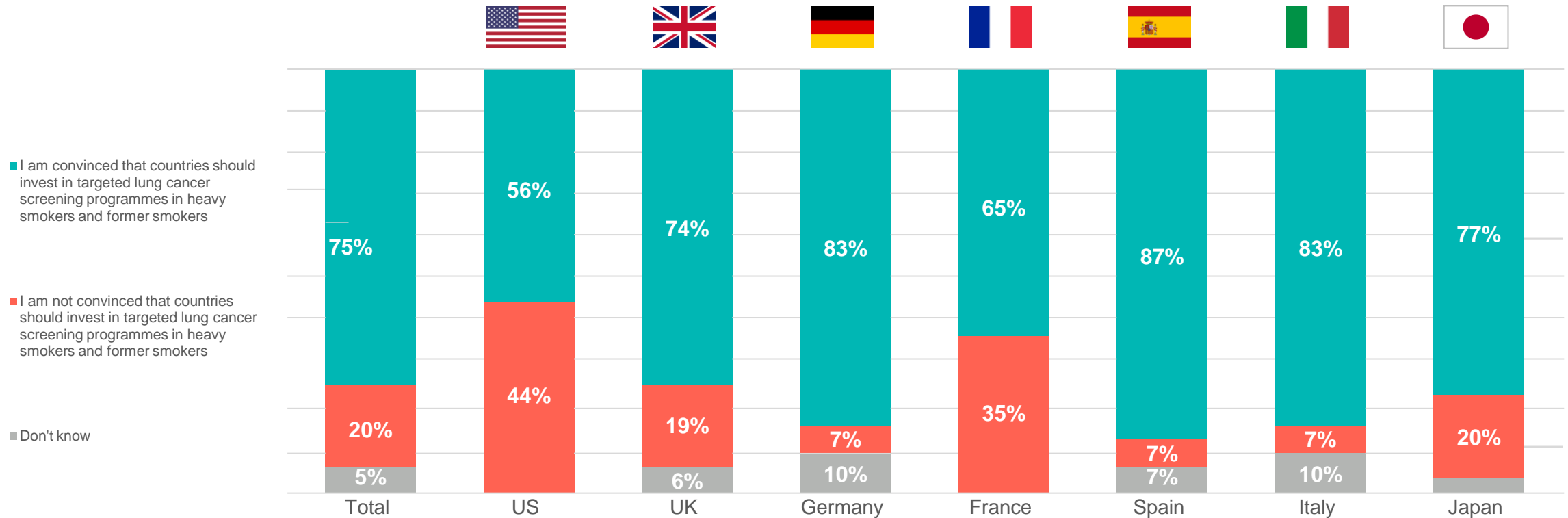
Q8. Recent clinical trial findings from large scale studies have shown that low-dose CT scans can act as a safe and effective screening tool to detect lung cancer at an early stage in heavy smokers or former smokers. Are you aware of this evidence?



The majority of policymakers are convinced that countries should invest in targeted lung cancer screener programmes. Positivity towards screening programmes is highest in Spain, Germany and Italy and lowest in the US and France.

Lung cancer screening views

Q9. Still thinking about the fact that clinical trial findings from large scale studies have shown that low-dose CT scans can act as a safe and effective screening tool to detect lung cancer at an early stage in heavy smokers or former smokers... Which of the following best describes your views?

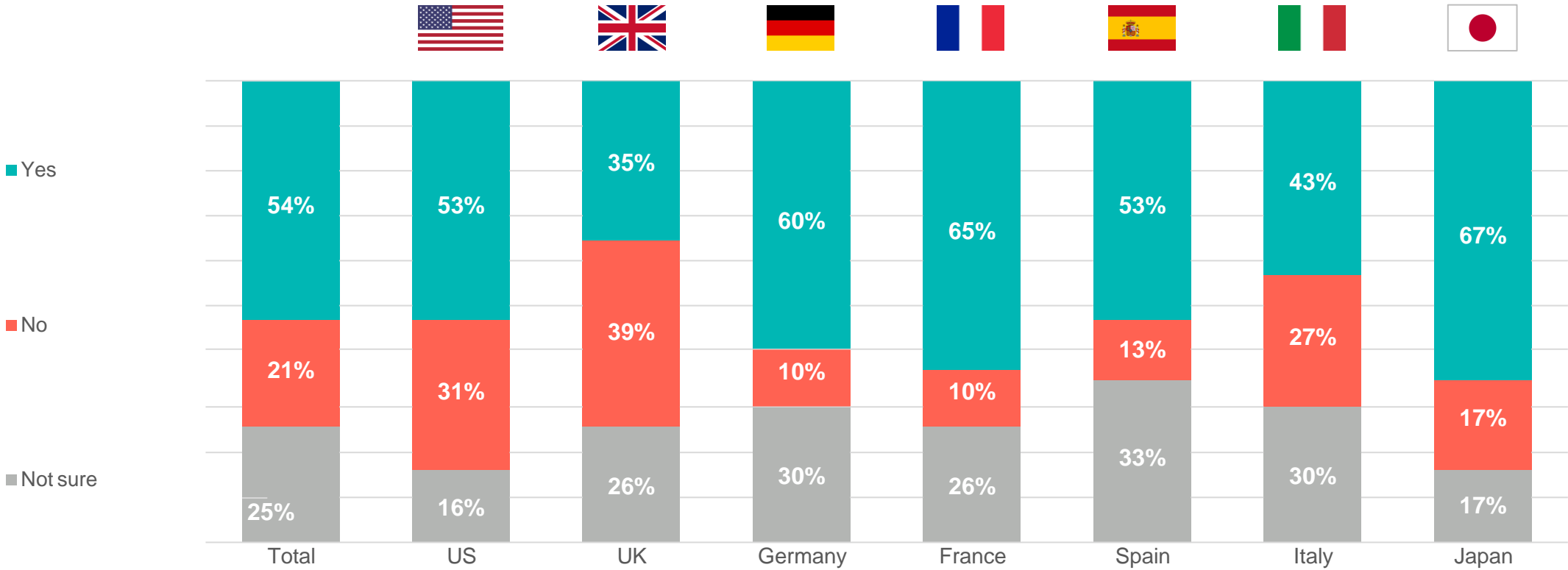


3b. Lung cancer screening programmes

The majority of policymakers surveyed reported having a lung cancer screening programme in their country. This belief was lowest in the UK.

Screening programme

Q10. Do you have a lung cancer screening programme in your country?

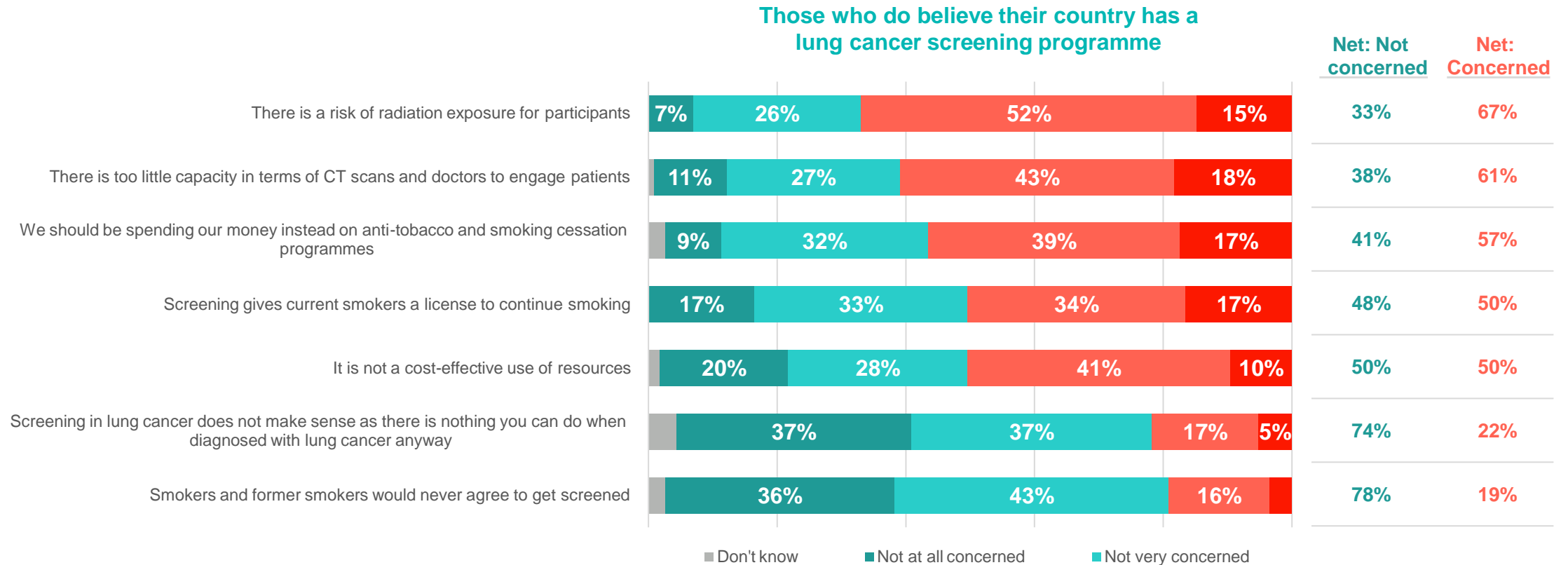


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Among policymakers that do believe their country has a screening programme, there are a number of concerns, including the risks of radiation exposure, capacity for scans and a belief that money could be better spent on prevention campaigns.

National screening programme

Q14. To what extent, if at all, are you concerned about any of the following for your country's screening programme?










Percentages under 5% have been removed from graph

Although the country sample sizes are small, the data indicates differences by countries among policymakers though most regard radiation exposure as a risk to participants.

National screening programme

Q14. To what extent, if at all, are you concerned about any of the following for your country's screening programme?

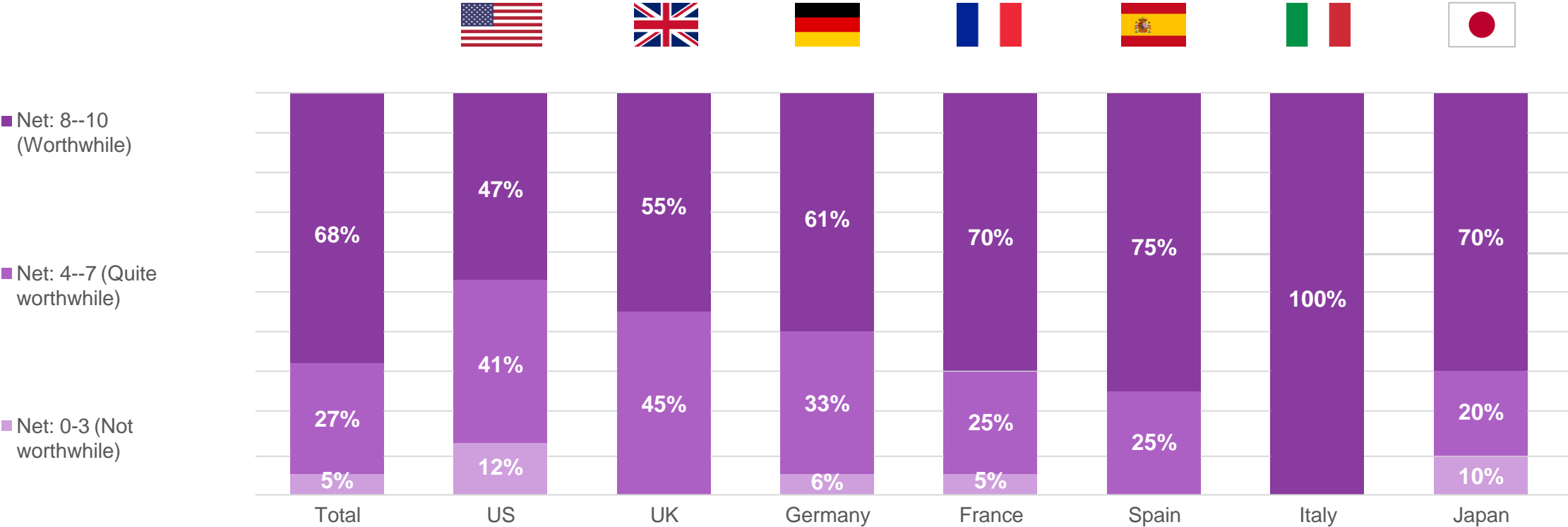
NET: Concerned

	Total							
There is a risk of radiation exposure for participants	67%	65%	55%	50%	65%	81%	85%	70%
There is too little capacity in terms of CT scans and doctors to engage patients	61%	82%	55%	50%	55%	44%	69%	70%
We should be spending our money instead on anti-tobacco and smoking cessation programmes	57%	65%	64%	50%	65%	38%	77%	45%
It is not a cost-effective use of resources	50%	47%	64%	61%	45%	31%	62%	50%
Screening gives current smokers a license to continue smoking	50%	71%	18%	39%	60%	38%	62%	55%
Screening in lung cancer does not make sense as there is nothing you can do when diagnosed with lung cancer anyway	22%	29%	27%	22%	30%	19%	15%	10%
Smokers and former smokers would never agree to get screened	19%	12%	18%	28%	30%	31%	8%	5%

However, policymakers generally consider lung cancer screening programmes to be worthwhile (though policymakers in Italy are more positive in some countries than others).

Worth of screening programme

Q13. To what extent, if at all, do you consider the lung cancer screening programme in your country is worthwhile?



Percentages under 5% have been removed from graph



Sample size: Those who answered "Yes" to [Q10] Do you have a lung cancer screening programme in your country? Total (115), US (17), UK (11), Germany (18), France (20), Spain (16), Italy (13), Japan (20).

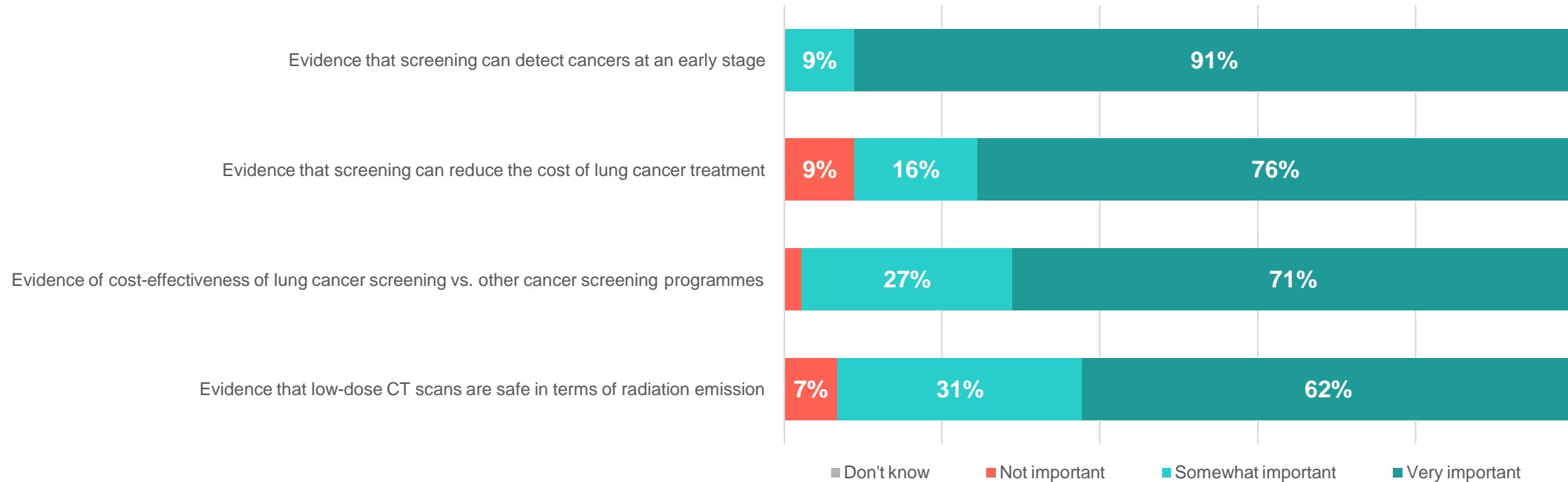
CAUTION: Low sample size

Policymakers who do not believe their country has a lung cancer screening programme may respond well to evidence that screening can detect cancers at an early stage – something they consider to be important.

No national screening programme

Q11. How important, if at all, are each of the following when it comes to guiding decisions about investing in a national screening programme?

Those who do not believe their country has a lung cancer screening programme

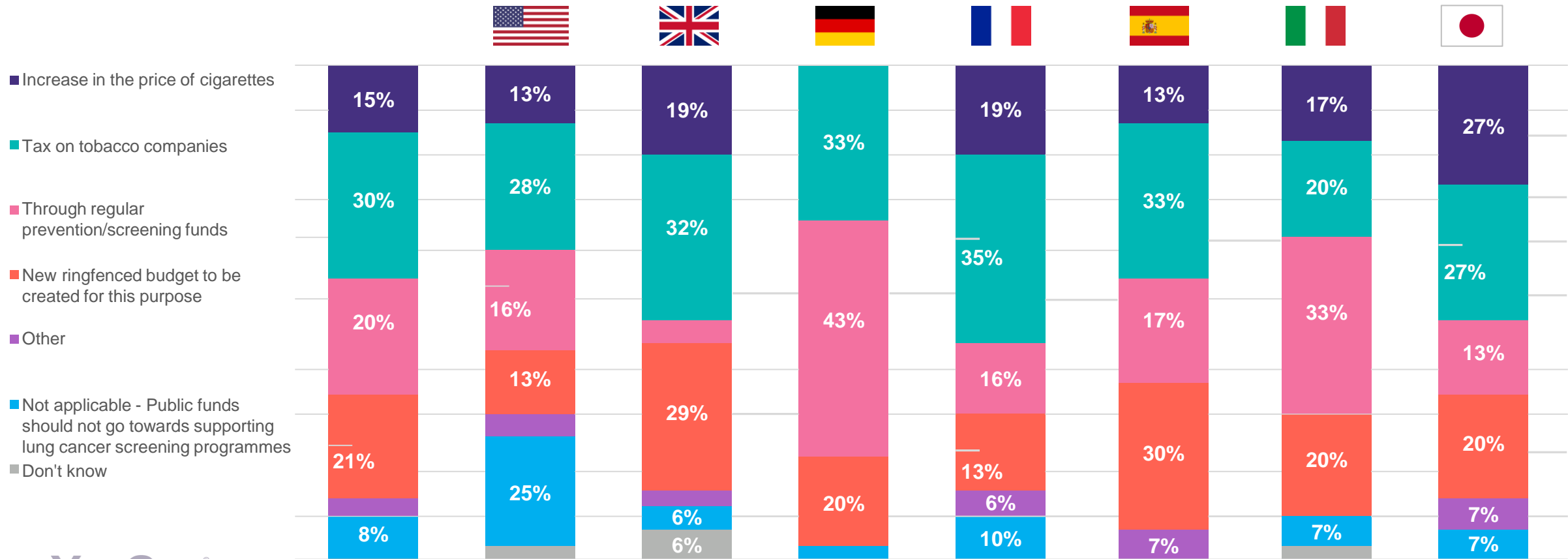


3c. Funding screening programmes

With the exception of Germany, policymakers in all countries are most likely to believe that the best way to secure funding for screening is through targeting tobacco companies – either through increasing the price of cigarettes or taxing those companies.

Funding screening programmes

Q15. Which of the following do you think is the best way to secure funding for a lung cancer screening programme in the long-term?



Percentages under 5% have been removed from graph 32

Sample size: Total (214), US (32), UK (31), Germany (30), France (31), Spain (30), Italy (30), Japan (30)

4. In summary








Key headlines

Executive summary

Headline	Summary
Cancer screening is important but not necessarily the main priority for policymakers	When thinking about the post-COVID recovery world, the majority of policymakers surveyed considered cancer screening to either be; not a main priority but still important or not a priority at all. Very few considered it to be their main priority with only policymakers in the US and Germany selecting this option.
The prominence of lung cancer and its links to smoking are well understood across all countries	The vast majority of policymakers in all countries were able to correctly identify lung cancer as the leading cause of cancer deaths globally and in their country. Policymakers generally considered it a smoker's disease – on average, they believed that about three quarters of lung cancers are linked to smoking with the other quarter occurring in non-smokers. They also believed that approximately one third of lung cancer patients will survive up to 5 years after being diagnosed.
Awareness of screening programmes is mixed though they are generally seen as worthwhile	Just over half of policymakers surveyed believed their country has a lung cancer screening programme but a sizeable proportion aren't sure. There are some concerns for the associated radiation risks but most policymakers still consider the programmes to be worthwhile. Those who do not believe their country to have a screening programme consider evidence that screening can detect cancers at an early stage to be important.
There is a lack of agreement as to how screening programmes should be funded but focusing on tobacco companies is generally seen as a priority	Although there isn't a unanimous view on how best to fund screening programmes, the majority of policymakers consider the options focused on tobacco companies to be preferable – either through increasing the price of cigarettes or taxing companies. There is also openness to allocating funds to screening.

There is a generally consistent picture across countries but there are also differences with countries over/under-indexing on certain beliefs and perceptions.

Country differences

	Over-indexing beliefs & perceptions	Under-indexing beliefs & perceptions
	Highest level of agreement that lung cancer is a smoker's disease	Lowest level of conviction that countries should invest in targeted lung cancer screening programmes in heavy smokers and former smokers
	Most likely to think that lung cancer cases are detected at a late stage compared to other types of cancer	Lowest proportion of policymakers that think the best way to secure funding for screening programmes is through regular prevention/screening funds
	Highest proportion of policymakers that see cancer screening as a priority for investment Most likely to think that lung cancer mostly affects men	Lowest level of disagreement that no treatments exist to cure lung cancer even if it is detected early Lowest awareness of evidence that low-dose CT scans can act as safe and effective screening tool
	Most likely to think lung cancer mostly affects women (though still see it as primarily a disease affecting men)	Least likely to think that lung cancer cases are detected at a late stage compared to other types of cancer
	Highest awareness of evidence that low-dose CT scans can act as safe and effective screening tool	Lowest % of people surviving up to 5 years from lung cancer
	Highest level of concern that there is a risk of radiation exposure for participants in screening programmes	Least likely to think that there have been no treatment advances in lung cancer
	Highest proportion of policymakers that believe their country has a lung cancer screening programme	Lowest % of lung cancers linked to smoking Lowest level of agreement that lung cancer is a smoker's disease

Looking at how each question overlaps with one another, there is a clear distinction between three groups of policymakers identified at Q6.

Three competing narratives

Q6. Survival rates for lung cancer are much worse than for many other common forms of cancer. Which of the following reasons best describe why you think this is? Please select one.

A large proportion of lung cancer cases are detected at a late stage compared to other types of cancer	78
People with lung cancer are usually smokers who have poor health habits	70
There have been no treatment advances in lung cancer so once detected, nothing can really be done	38

There are differences in perceptions between these three groups across a range of measures, especially in terms of what exactly the problem is and how it should be solved.

Three competing narratives

Reason for low lung cancer survival rates @ Q6:	Late detection	Smokers	No treatment
Number of policymakers in sample citing reason:	78	70	38
Over-indexing measures:	<p>Most likely to consider screening a priority</p> <p>Least likely to think that expensive treatment should be reserved for non-smokers</p> <p>Most aware of evidence that low-dose CT scans can act as a safe and effective screening tool</p> <p>Most likely to be convinced that countries should invest in screening programmes targeting smokers and former smokers</p> <p>Funding should come from: ring-fenced budget</p>	<p>Most likely to think lung cancer affects men</p> <p>Most likely to be concerned by risk of radiation exposure for participants</p> <p>Most likely to be think that we should be spending money on anti-tobacco and smoking cessation programmes</p> <p>Funding should come from: tax on tobacco companies</p>	<p>Least likely to think that lung cancer is field of oncology where the most significant treatment advances have been made</p> <p>Least likely to be convinced that countries should invest in screening programmes targeting smokers and former smokers</p> <p>Most likely to be concerned that screening does not make sense because there is nothing you can do when diagnosed with lung cancer</p> <p>Funding should come from: tax on tobacco companies</p>

There are also big differences between those who believe lung cancer is a smoker's disease (103 policymakers) and those who do not (44 policymakers).

A smoker's disease?

Unsurprisingly, those who consider lung cancer a smoker's disease believe a higher percentage of lung cancers are linked to smoking than those who do not believe it is a smoker's disease (78% vs. 70%).

Those who don't consider lung cancer to be a smoker's disease are more likely to believe there have been advances in treatment (39% vs. 17%). Unsurprisingly, they are also much less likely to believe that expensive treatment should be reserved for non-smokers (11% vs. 53%).

Those who believe lung cancer is a smoker's disease are more likely to think screening should be funded by taxing tobacco companies (35% vs. 14%) and less likely to think new ring-fenced budget should be created for this purpose (11% vs. 39%).

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YouGov Topline Summary

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