

Survey of Clinical Trial Awareness and Attitudes

Purpose of the Study

Over \$2 billion per year is spent on recruiting patients for clinical trials, yet slow patient enrollment is the primary cause of delay for clinical trials. Clinical trials provide improved medical care, promote the general health of society and often compensate the patient, yet only a small fraction of the population has ever participated in a clinical trial.

To promote access to medical care and improve the efficiency of recruitment, SubjectWell has run a survey to understand American understanding of attitudes toward clinical trials. This survey is the first in a series that targets the 96% of the population that hasn't participated in a trial and seeks to understand and investigate their attitudes about how their participation can be improved.

Summary of Findings

Low familiarity of clinical trials and low awareness of advertising for clinical trials along with lack of negative perceptions points to opportunity.

Half (50%) of all respondents were not aware of clinical trials and only a very small percentage have ever participated in a clinical trial (4%). Ninety-six percent (96%) of respondents have never participated in a clinical trial.

When asked specifically if they could recall any advertising for clinical trials 57% responded "no."

Of respondents who had seen advertising, broadcast mediums like TV (44%) and radio (17%) were most commonly recalled. Online or digital advertising accounted for 15% and social media accounted for 4%.

Lack of awareness contributes to low confidence about participation

The results also suggest that there is a need to publicize resources of trials that are enrolling patients. Only 31% of respondents said they felt “confident” (20%) or “very confident” (11%) in their ability to find or identify a clinical trial if they wanted to participate. This leaves almost two thirds of respondents searching for better sources of trials.

Despite this, public perceptions of trial remain favorable

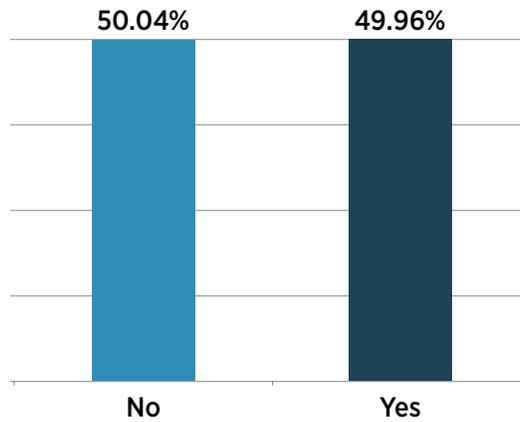
A significant percentage of respondents (47%) have a somewhat or very positive perception of clinical trials. The high percentage of those indicating neutral perceptions of clinical trials means there is an enormous opportunity to educate and influence those patients. Recruiting new patients who have never previously participated in a trial is obviously far easier when there are no negative perceptions that need to be overcome.

- 49% hold neutral perceptions of clinical trials
- 34% indicate somewhat positive perceptions
- 13% indicate very positive perceptions

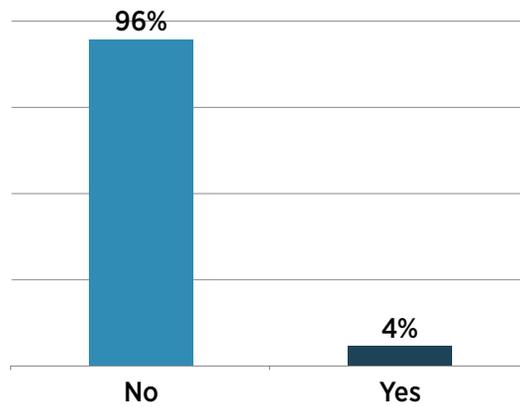
When asked who clinical trials are for, more than half (66%) believe clinical trials are either for anyone (34%) or they aren't sure (32%). These numbers again reinforce that the striking lack of familiarity with clinical trials is an opportunity to educate, influence and ultimately, engage consumers. Even better fifteen percent (15%), the next highest percentage, believe clinical trials are for those who are “interested in advancing science and helping others.”, an altruistic message that is a positive for the industry.

Complete Findings

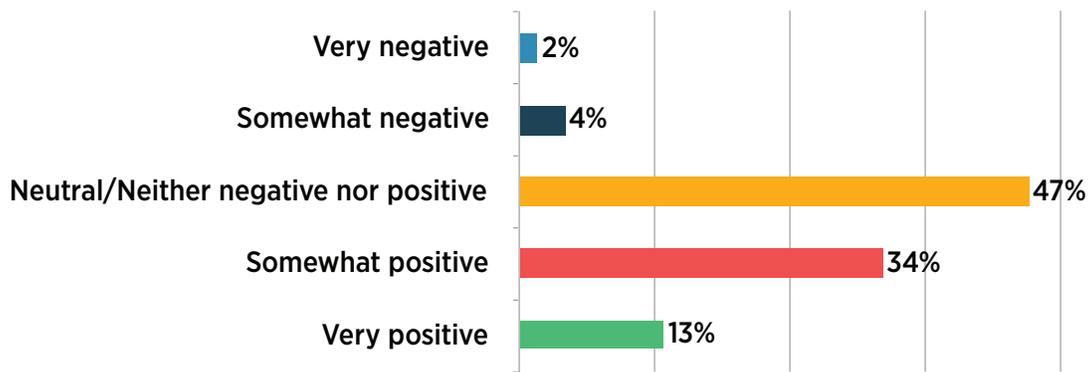
Q1. Have you ever heard of a clinical trial?



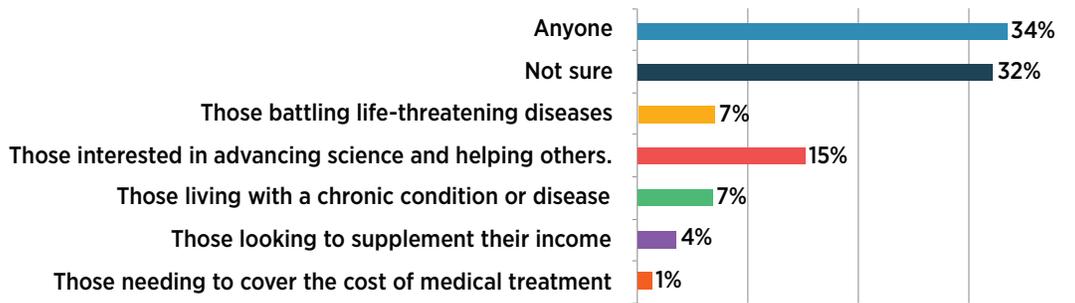
Q2. Have you ever participated in a clinical trial?



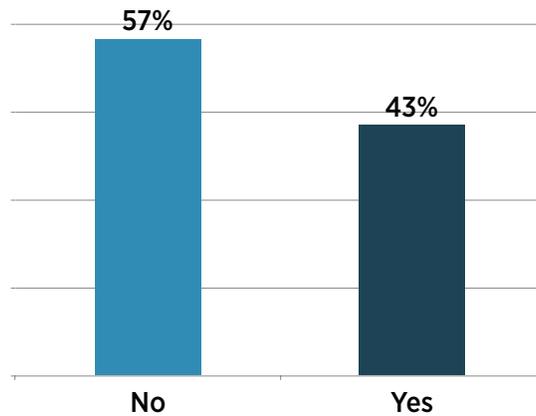
Q3. What is your perception of clinical trials?



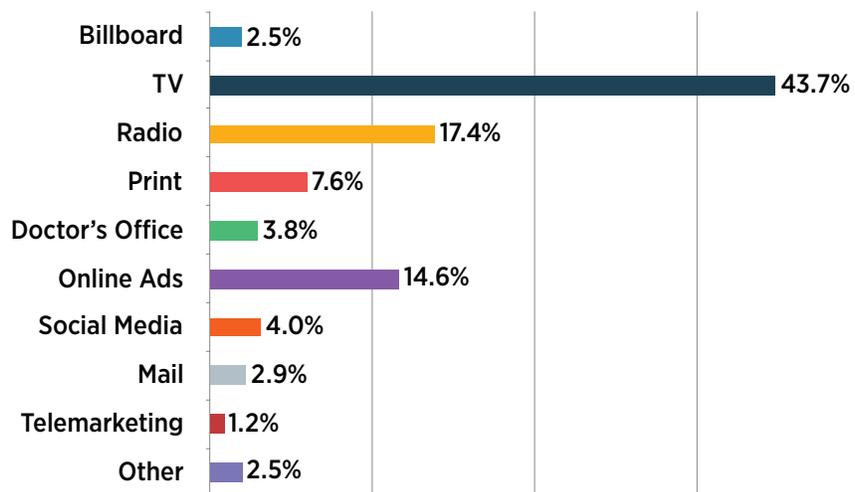
Q4. Who are clinical trials for?



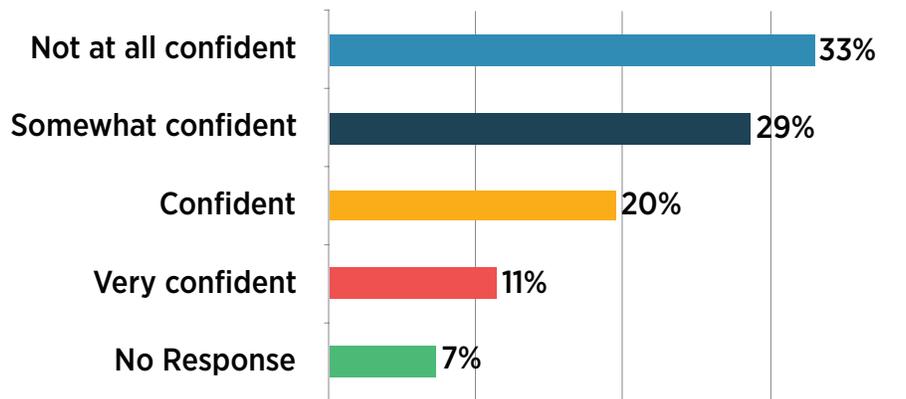
Q5a. Do you recall seeing ads for clinical trials of any kind?



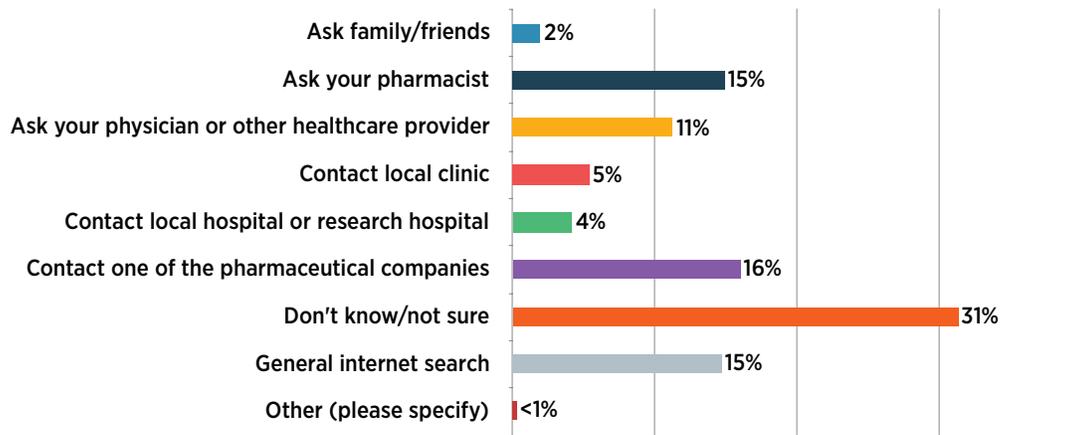
Q5b. What types of ads do you recall?



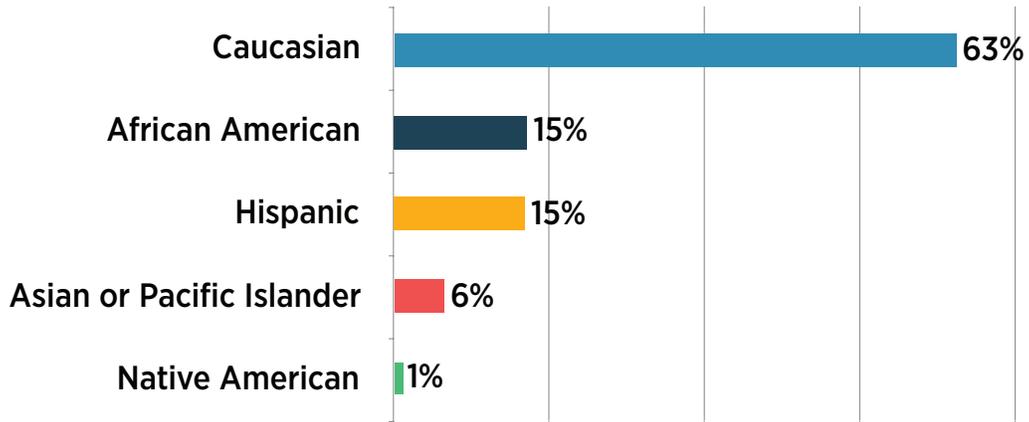
Q6. How confident are you that you would be able to find a clinical trial?



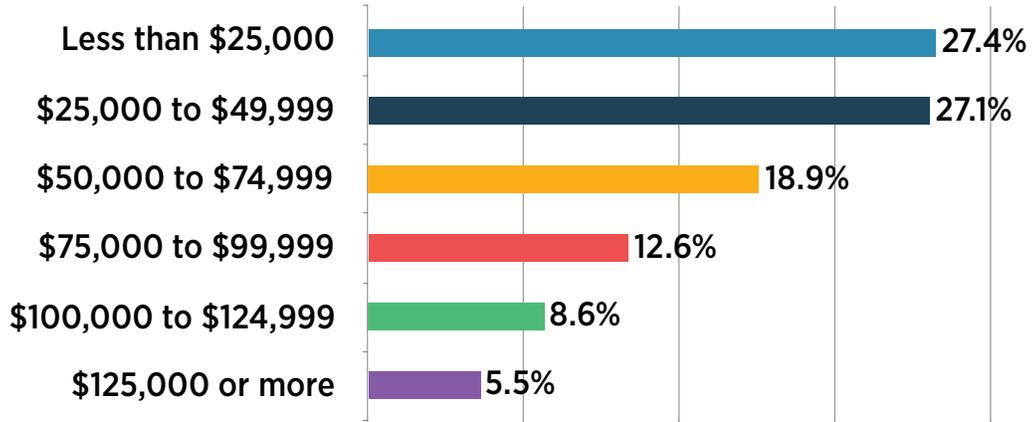
Q7. What would be your first step to find a clinical trial?



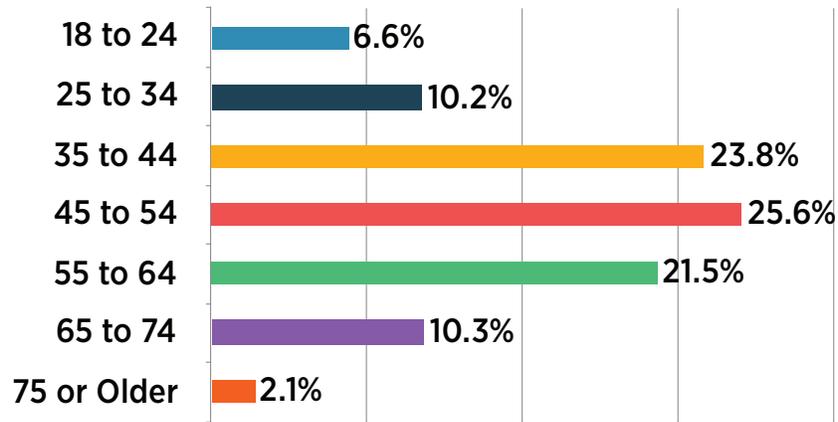
Race



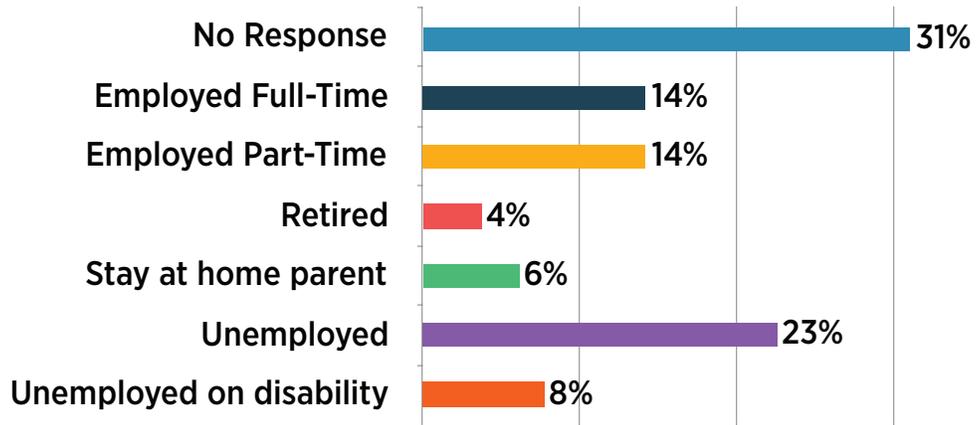
Income



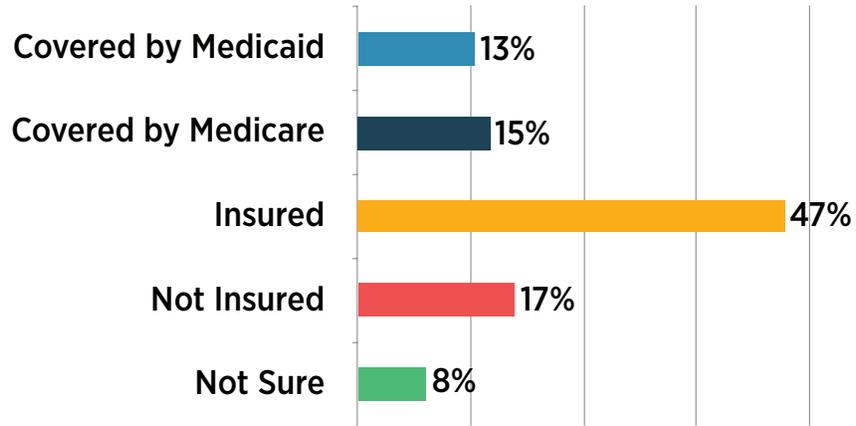
Age



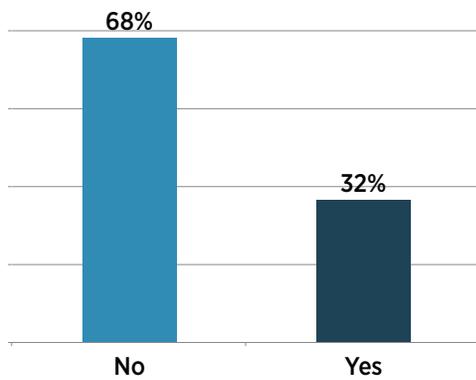
Employment



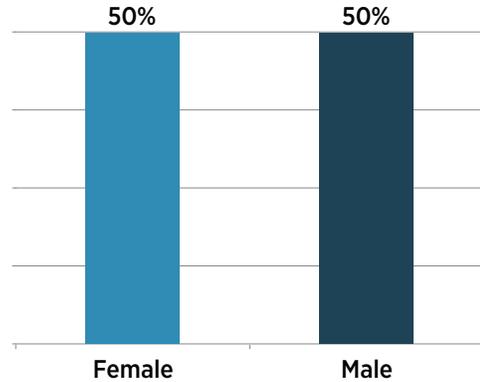
Health Insurance



Chronic Illness



Gender



Survey Methodology

The survey was conducted over the phone, for 35 days. Calls were placed from December 14th 2015 to January 18th 2016. Total responses received were 2,164, of which 702 were complete. Completion of a response implies that the respondent made it to the end of the telephone survey, so some questions have missing responses. Respondents with connections to the marketing, news, public relations, healthcare and health insurance industries were filtered out.

The categories of questions asked included demographics, exposure to clinical trial (CT) advertising and how CTs are perceived. Data was collected for respondent gender, age group, ethnicity, employment status, insurance status, income range and whether or not the respondent suffers from a chronic condition. These were chosen for sampling purposes and to look for novel demographic trends that apply to CT recruitment.

Advertising exposure questions were included to attempt to intuit useful information about the current CT recruiting landscape. Respondents were asked if they recalled seeing any CT advertising, and if so what type did they observe. This approach was chosen for survey brevity.

The perception questions included awareness of CTs, participation in CTs, and how CTs are viewed. A question of how confident respondents would be at finding a relevant CT for themselves was asked along with the avenue they would pursue CT enrollment through.

Sampling Methodology

In order to get the most balanced view of Americans' CT perceptions, responses were sampled so that they match the gender, ethnic and income distributions of the United States. The distributions were derived from US Census data.

After sampling, the distributions of the responses were analyzed and averaged. This method prevents any undue bias from a single sample.

In order to utilize the individual responses and the information different combinations could yield, a single sample was set aside. The differences in these sampling techniques are the sole cause of any difference in the responses.

About SubjectWell

SubjectWell is the first risk-free patient recruitment marketplace for clinical trials. SubjectWell engages the 96% of Americans who have never participated in a clinical trial and connects them to pharmaceutical, biotechnology, and contract research organizations to help them accelerate enrollment and stay on schedule. By reaching beyond the usual candidate population to increase clinical trial participation, SubjectWell is driving the innovation rate of medical science so that people can live longer, better, healthier lives. SubjectWell is headquartered in Austin, Texas. For more information, please visit <http://subjectwell.com>.