



TOPLINE & METHODOLOGY

New multi-cancer early detection test developed by GRAIL ranked as one of the most important potential employee benefits

The test positively impacts employee perceptions of employers and could lead to higher satisfaction.

New York, NY and Menlo Park, CA, February 6, 2023 – A recent Ipsos poll* conducted on behalf of GRAIL finds that a majority of eligible employees would want to know as early as possible if they had cancer, and would use a product that matches the description of the Galleri® test (hereafter, Galleri®) if it were offered as a no-cost benefit by their employer (see methodology below for details). “Eligible employees” (hereafter, employees) are those employed full-time at medium to large companies, and are considered eligible to receive the Galleri® test due to being aged 50 or older, or having other elevated risks of cancer. Furthermore, when asked about potential benefits that an employer might offer, employees ranked Galleri® as the most important, on par with an incremental \$1000 salary increase. The survey results also suggest that Galleri® could positively impact employees’ perceptions of their employer and could lead to higher employee satisfaction. In addition, employees believe that using Galleri® could have a positive emotional impact, including giving them a sense of control over their health.

Detailed Findings

1. Vast majority (92%) of employees surveyed agree that they would want to know as early as possible if they had cancer.
2. After exposure to a blinded Galleri® test profile (see methodology for details), the majority (84%) of employees say they would use the test in the next six months if it were offered as a benefit from their employer at no cost to them.
3. 95% of employees surveyed feel that Galleri®, if offered as an employee benefit, would meet the needs of employees like them very well or fairly well.
4. Galleri® is ranked as one of the most important potential benefits (among the 14 tested), on par with an incremental \$1000 salary increase and ahead of other traditional benefits. This is shown by relative importance score, on a scale of 0 to 100, with 0 meaning not at all important and 100 meaning highest importance relative to the other items
 - Importance score of 79.1 for Galleri®
 - Importance score of 77.7 for a \$1,000 salary increase
 - Importance score of 68.9 for an incremental 1% 401k match increase
 - Importance score of 61.6 for flexible work arrangements
 - Importance score of 59.2 for cardiovascular health programs
 - Importance score of 43.5 for genetic risk factor testing
 - Importance score of 39.9 for on-demand medicine

200 Park Avenue, 11th Floor
New York, NY 10016

Contact: **Eric Blouin**
Senior Vice President, Healthcare (Oncology)
Email: eric.blouin@ipsos.com
Tel: +1 646 610-3164

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- Importance score of 30.6 for weight management program
 - Importance score of 21.1 for sleep health program
 - Importance score of 19.7 for digital mental health solution
5. Offering the Galleri® test as a benefit could positively impact employees' perceptions of their employer. Perceptual changes include most employees agreeing that a company offering the test:
- Shows a commitment to fighting cancer (84%)
 - Is helping to minimize employees' healthcare costs (83%)
 - Is innovative (82%)
 - Cares about the health and wellbeing of its employees (81%)
 - Values and invests in its employees (79%)
 - Cares about providing access to healthcare benefits for a diverse employee population (77%)
 - Prioritizes the mental health of its employees (57%)
6. In addition, offering Galleri® as a benefit has potential to increase employee satisfaction, retention and attraction:
- Three-quarters (76%) of employees agree that they would be more satisfied with their employer if they offered the Galleri® test as a no-cost benefit
 - Half (51%) agree that if their employer offered Galleri®, they would be more likely to stay at the company
 - Two-thirds (69%) of employees say that if a potential new employer offered Galleri® as a benefit at no cost to them, it would have at least some impact on their consideration of that company versus other prospective employers
7. Most employees believe using Galleri® could have a positive emotional impact:
- 87% agree that using Galleri® would make them feel like they had taken proactive action in terms of their health
 - 79% agree that using Galleri® would give them a sense of control
 - 75% agree that using Galleri® would make them feel empowered





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Ipsos Employer Market Research for GRAIL

*Conducted by Ipsos using M360 Research's <https://www.m360research.com/> and <https://www.m3globalresearch.com/> proprietary panels, and two other partner panels, Dynata (<https://www.dynata.com/>) and Luc.ID (a Cint group company; <https://www.cint.com/>).

A survey of employees at elevated risk for cancer (ages 50+ or age 35-49 at high risk[^]) working at medium to large US companies (of 3,000+ employees)

Interview dates: August 18 – September 8, 2022

Number of interviews: 1000

Number of participants aged 50 or older: 850

Number of participants aged 35-49 and considered high-risk[^]: 150

[^]Defined as individuals who have:

- At least one of these risk factors: cirrhosis or chronic Hepatitis B or C infection, infection with certain strains of HPV (e.g., 16 or 18), known hereditary cancer syndrome, had cancer at least 3 years ago, and/or are current smokers or quit smoking less than 10 years ago.
- At least two of these risk factors: documented genetic predisposition to cancer, first degree relative with cancer, HIV, use immunosuppressive therapies after organ transplantation, diabetes, and/or high BMI (i.e., ≥ 30 for females and ≥ 35 for males)

All participants were screened to ensure they are full-time employees working at medium to large companies (of 3000+ employees)

Credibility Interval: +/- 3.8 percentage points at the 95% confidence level

In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent.

NOTE: All results show percentages among all respondents, unless otherwise labeled.





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S1. Are you...

	Total sample, n=1000
Male	44%
Female	56%
Non-binary/other	<1%
Prefer not to answer	0%

S2. How old are you?

	Total sample, n=1000
35-49 years [TERMINATE IF <35] [TERMINATE IF NOT HIGH RISK (SEE S9, S10, S11)]	15%
50-64 years	70%
65+ years	15%

S3. Where do you live?

	Total sample, n=1000
Northeast (CT, ME, MA, NH, RI, NJ, NY, PA, VT)	18%
Midwest (IL, IN, MI, OH, WI, IA, KS, MN, MO, NE, ND, SD)	21%
South (DE, FL, GA, MD, NC, SC, VA, DC, WV, AL, KY, MS, TN, AR, LA, OK, TX)	40%

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West (AZ, CO, ID, MT, NV, NM, UT, WY, CA, HI, OR, WA, AK)	21%
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CLASSIFIED INTO 4 CENSUS REGIONS BASED ON STATE

S6. Please give your best guess for how many full-time US-based employees work in your organization?

	Total sample, n=1000
1 (sole proprietor) [TERMINATE]	0%
2 – 99 [TERMINATE]	0%
100 – 499 [TERMINATE]	0%
500 – 999 [TERMINATE]	0%
1,000 – 2,999 [TERMINATE]	0%
3,000 – 8,999	33%
9,000 – 14,999	18%
15,000 or more	49%
Not sure [TERMINATE]	0%
None, organization is entirely ex-US [TERMINATE]	0%

S7. Are you of Hispanic, Latino, or Spanish origin?

	Total sample, n=1000
Yes	13%
No	87%
Prefer not to answer [TERMINATE]	0%

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S8. What is your race? Please select all that apply.

	Total sample, n=1000
White	78%
Black or African American	14%
American Indian or Alaska Native	1%
Asian	7%
Native Hawaiian or other Pacific Islander	<1%
Other (specify)	1%
Prefer not to answer [EXCLUSIVE, TERMINATE]	0%

S9. Do you currently have or have you ever had any of the following health or medical conditions? Please select all that apply.

	Total sample, n=1000
Cancer - completed treatment 3 or more years ago	6%
Cancer - completed treatment less than 3 years ago	2%
Cancer (currently undergoing treatment) [TERMINATE]	0%
Chronic Hepatitis B or C infection	1%

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Chronic obstructive pulmonary disease (COPD)	2%
Cirrhosis	<1%
Diabetes (type I or II)	17%
Heart disease e.g., coronary artery disease, past heart attack, etc.	5%
Hereditary cancer syndrome e.g., Li-Fraumeni syndrome, Hereditary Breast and Ovarian Cancer syndrome (BRCA1/2), Lynch syndrome (CHEK2)	1%
Other documented genetic predisposition to cancer	1%
High cholesterol	36%
HIV infection	1%
High BMI i.e., [IF S1=1: ≥ 35 , IF S1=2 OR 3: ≥ 30]	15%
HPV infection e.g., HPV 16 or 18	1%
Hypertension (i.e., high blood pressure)	35%
Use of immunosuppressive therapies after organ transplantation	1%

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None of the above [EXCLUSIVE]	33%
Prefer not to answer [EXCLUSIVE]	1%

S10. Do you have a first degree relative with cancer, such as a parent, child, and/or a full biologically-related brother or sister? Do not include extended family such as grandparents.

	Total sample, n=1000
Yes	41%
No	59%
Prefer not to answer	<1%

S11. Which of the following describes your smoking status?

	Total sample, n=1000
I regularly smoke tobacco	18%
I occasionally smoke tobacco	6%
I have smoked tobacco regularly in the past, but quit <u>within the last 10 years</u>	7%
I have smoked tobacco regularly in the past, but quit <u>more than 10 years ago</u>	17%
I have never smoked tobacco / never smoked regularly	53%
Prefer not to answer	<1%

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Q130. To what extent do you agree or disagree with the following statement: *I would want to know as early as possible if I had cancer*

	Total sample, n=1000
Strongly disagree	4%
Somewhat disagree	1%
Neither agree nor disagree	3%
Somewhat agree	9%
Strongly agree	83%

A **blinded Galleri®** test description was provided to respondents and referred to as “*Product X*” throughout the questionnaire. The test was framed in the context of a hypothetical new benefit to be offered by their employer at no cost, separate from their current medical plan, and the results would be confidential and not disclosed to their employer.

Cancer frequently goes undetected until it is at an advanced stage. Currently, only a few single-cancer screenings (e.g., colonoscopy, mammogram) are broadly available, so most cancers are detected at later stages.

***Product X** is a new early detection test that screens for a shared cancer signal across more than 40 cancer types at once to potentially detect cancer before symptoms occur. Product X is recommended for use in adults with an elevated risk for cancer, such as those aged 50 or older. The test is prescribed by a healthcare provider and taken through a routine blood draw.*

If a cancer signal is detected, the test can point to where in the body the signal is coming from: for example, the lungs. A healthcare provider would use this to guide follow-up testing to confirm and diagnose the cancer.

The test does not measure genetic risk of cancer in the future; it instead looks for cancer at the time the test is taken.

Important Safety Information:

- *Product X does not detect all cancers and should be used in addition to routine cancer screening tests*
- *False-positive (a cancer signal detected when cancer is not present) and false-negative (no cancer signal)*

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detected when cancer is present) test results do occur

- *Product X is administered in a clinical laboratory that is certified under the Clinical Laboratory Improvement Amendments of 1988 (CLIA) and accredited by the College of American Pathologists (CAP)*
- *Product X is marketed as a laboratory-developed test*

Q220. If Product X were offered as a benefit from your employer at no cost to you, how likely would you be to get the test **in the next six months**?

	Total sample, n=1000
Very unlikely	2%
Moderately unlikely	2%
Neither likely nor unlikely	12%
Moderately likely	28%
Very likely	56%

Q240. How well, if at all, do you feel Product X as an employee benefit meets the needs of employees like you?

	Total sample, n=1000
Not at all well	1%
Not very well	5%
Fairly well	39%
Very well	56%

Q250. To what extent do you agree or disagree with the following statements: *A company offering Product X...*

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Total sample, n=1000	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
...cares about the health and wellbeing of its employees	4%	2%	14%	31%	50%
...prioritizes the mental health of its employees	4%	7%	33%	28%	28%
...values and invests in its employees	4%	2%	15%	33%	47%
...shows a commitment to fighting cancer	4%	2%	10%	28%	56%
...cares about providing access to healthcare benefits for a diverse employee population	4%	3%	17%	33%	43%
...is helping to minimize my healthcare costs (by paying for Product X and potentially reducing future cancer costs)	4%	3%	10%	32%	51%
...is innovative	4%	2%	12%	29%	53%

Q260. To what extent do you agree or disagree with the following statements:

Total sample, n=1000	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
If my company offered Product X, I would be more likely to stay at the company	4%	4%	41%	28%	23%
I would be more satisfied with my employer if they offered Product X as a no cost benefit	3%	2%	19%	30%	46%

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Q270. Now, please imagine that you are looking to change jobs. If a **potential new employer offered Product X as a benefit** at no cost to you, to what extent would that impact your consideration of that company versus other prospective employers, if at all?

	Total sample, n=1000
No impact on my consideration	13%
Not much impact on my consideration	18%
Some impact on my consideration	33%
A fair impact on my consideration	24%
Substantial impact on my consideration	12%

Q320. Please imagine that you have used Product X. To what extent do you agree or disagree with the following statements: *Using Product X would...*

Total sample, n=1000	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
...make me feel empowered	2%	3%	20%	40%	35%
...make me feel like I have taken proactive action in terms of my health	3%	2%	9%	32%	55%
...give me a sense of control	3%	2%	16%	41%	38%



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MaxDiff (Maximum difference scaling) exercise

In this survey, we included a MaxDiff exercise.

What is MaxDiff? MaxDiff is a way to evaluate stated importance by forcing differentiation among a list of attributes. Results are presented as scores that show relative importance between statements, on a scale from 0, meaning not at all important, and 100, meaning highest importance relative to the other items. Therefore, you can interpret an item which has double the value of another item as twice as important.

Intro to the MaxDiff exercise in this survey:

Imagine that your employer is revising their benefits program and has asked your opinion on which new benefits to offer. In this exercise, you will see a series of sets of benefits to choose from. For each set, please tell us which benefit is **most important to you** and which is **least important to you**.

Respondents were shown definitions for the benefits included in the exercise:

\$1,000 salary increase: Your employer increases your annual salary by \$1,000.
401(k) matching increase: Your employer increases the rate at which they match your 401(k) contribution by 1%. If you do not currently receive a 401k match, you would receive one at 1% of your annual pre-tax salary.
Digital mental health solution: Counseling with licensed professionals through virtual telemedicine sessions or through an app.
Sleep health program: Access to programs to help insomnia or poor sleep hygiene e.g., sleep training programs, cognitive behavioral therapy for insomnia, or nap rooms.
Fertility benefits: Access to benefits addressing family planning or infertility, e.g., infertility diagnosis, in-vitro fertilization (IVF), egg freezing, donor sperm or eggs, intrauterine insemination (IUI), and gestational carrier services.
Genetic risk factor testing: A one-time test that tells your genetic predisposition for cancers, heart disease, or how your body may process certain medications. Tells you your <u>genetic risk</u> (not whether you currently have any health conditions). Ordered by a physician and done through a saliva sample.
On-demand medicine: Access to a remote physician through video calls, voice calls, and through an app. Available at any time without an appointment, for both urgent care and primary care needs. Can coordinate with your regular primary care physician.
Smoking cessation support: In-person or app-based coaching or pharmaceutical treatment to support smoking cessation.
Weight management program: In-person or app-based coaching for weight management.
Cardiovascular health program: In-person or app-based coaching for management of cardiovascular conditions such as high blood pressure, coronary artery disease, or congestive heart failure.



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Digital musculoskeletal therapy: App-based coaching, wearable sensors, and/or pain management solutions to address musculoskeletal conditions, such as joint pain or pelvic floor issues, e.g., Hinge Health.

Caregiver support: One-on-one advisors, concierge services, and educational resources for employees who are caregivers e.g., Family First, Cariloop, Care@Work, etc.

Flexible work: E.g., remote or hybrid (in-office/remote) working arrangements

Product X: A new early detection test that screens for a shared cancer signal across more than 40 cancer types at once to potentially detect cancer before symptoms occur. The test is prescribed by a healthcare provider and taken through a routine blood draw.

Q400. Looking at the following benefits which could be offered by your employer, please select the one benefit that is **most** important to you, and the one benefit that is **least** important to you.

Most important		Least important
<input checked="" type="radio"/>	Benefit 1	<input type="radio"/>
<input type="radio"/>	Benefit 2	<input type="radio"/>
<input type="radio"/>	Benefit 3	<input checked="" type="radio"/>
<input type="radio"/>	Benefit 4	<input type="radio"/>

[This exercise was repeated 11 times, each with a different set of 4 benefits to trade-off.]



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Q400 (MaxDiff), Total Sample, n=1000	MaxDiff relative importance
Product X	79.1
\$1,000 salary increase	77.7
1% 401k match increase	68.9
Flexible work	61.6
Cardiovascular health program	59.2
Genetic risk factor testing	43.5
On-demand medicine	39.9
Weight management program	30.6
Sleep health program	21.1
Digital mental health solution	19.7
Digital musculoskeletal therapy	18.3
Caregiver support	15.4
Smoking cessation support	6.7
Fertility benefits	3.4

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Email: eric.blouin@ipsos.com
Tel: +1 646 610-3164

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About the Study

This Ipsos poll was conducted August 18 – September 8, 2022 online, in English by Ipsos on behalf of GRAIL, using M360 Research's <https://www.m360research.com/> and <https://www.m3globalresearch.com/> proprietary panels, and two other partner panels, Dynata (<https://www.dynata.com/>) and Luc.ID (a Cint group company; <https://www.cint.com/>).

This poll is based on a sample of 1,000 adults from the continental U.S., Alaska and Hawaii, that included:

- 850 individuals aged 50 or older
- 150 high-risk individuals aged 35-49^

^ Defined as individuals who have:

- *At least one of these risk factors: cirrhosis or chronic Hepatitis B or C infection, infection with certain strains of HPV (e.g., 16 or 18), known hereditary cancer syndrome, had cancer at least 3 years ago, and/or are current smokers or quit smoking less than 10 years ago.*
- *At least two of these risk factors: documented genetic predisposition to cancer, first degree relative with cancer, HIV, use immunosuppressive therapies after organ transplantation, diabetes and/or high BMI (i.e., ≥ 30 for females and ≥ 35 for males)*

All participants were screened to ensure they are full-time employees working at medium to large companies (of 3000+ employees)

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including but not limited to coverage error and measurement error. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.8 percentage points for all respondents. The Credibility Interval error is higher and varies for results based on other sub-samples. In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent.

The sample was representative across gender (44% male, 56% female, <1% non-binary/other), geography (18% Northeast, 21% Midwest, 40% South, 21% West), household income (15% <\$50K, 33% \$50K-100K, 26% \$100K-\$150K, 13% \$150K-200K, 12% \$200K+), race (78% White, 14% Black or African American, 7% Asian, 1% American Indian or Alaska Native, <1% Native Hawaiian or other Pacific Islander, 1% other) and ethnicity (13% Hispanic).

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About Ipsos

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