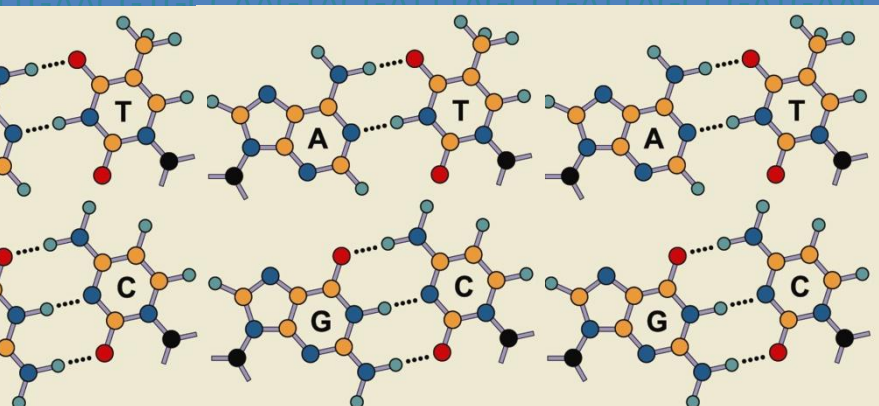


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**Cogent  
Genomics  
Attitudes &  
Trends: 2008**

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## **OBJECTIVES & METHODOLOGY**

- KEY FINDINGS
- DETAILED RESEARCH FINDINGS
  - GENOMICS
  - PHARMACOGENOMICS
  - NUTRIGENOMICS
- SEGMENTATION ANALYSIS
- RESPONDENT PROFILE

# OBJECTIVES

## PRIMARY GOAL

- Provide a comprehensive and actionable assessment of Americans' attitudes toward genomics over time

## SPECIFIC AIMS

- Measure awareness, attitudes, and preferences for using genetic information to optimize health
- Conduct an in-depth exploration of consumer views toward nutrigenomics and pharmacogenomics
- Analyze the data through a psychographic segmentation model of consumer health management behavior to reveal and maximize market opportunities



## ISSUES EXPLORED

### Awareness, Interest, and Usage

- To what extent are Americans aware of the role of genes in overall health?
- To what extent are Americans aware of genomics and DTC genetic testing?
- How interested is the American public in genomics?
- What health issues and benefits are of greatest interest?
- What activities have consumers conducted surrounding genetic testing?

### Perceptions and Barriers

- What are the perceived major benefits of genomics?
- What are the perceived major drawbacks of genomics (i.e., barriers to acceptance)?
- What specific concerns exist regarding genetic information and its use?

### Product Design

- What are consumers' preferences regarding product design as it relates to: target benefits testing (location, storage, delivery), product format, and product attributes?

### Communications

- What is the role of the government and the physician?
- What/who are the most credible sources of information regarding genomics?

### Policies

- To what extent are Americans aware of legal protections?
- What knowledge, if any, do Americans have regarding current policy?
- What protection from the government do consumers seek?



# METHODOLOGY

Population:	U.S. adults (18+)
Sample Profile:	Representative of U.S. population on age, socioeconomic profile, ethnicity, region, and gender
Data Collection Period:	May 30-June 9, 2008
Methodology:	Web survey
Survey Length:	20 minutes
Sample Size (error):	n=1,000 ( $\pm 3.11$ percentage points) Year to year comparisons ( $\pm 4.4$ percentage points)

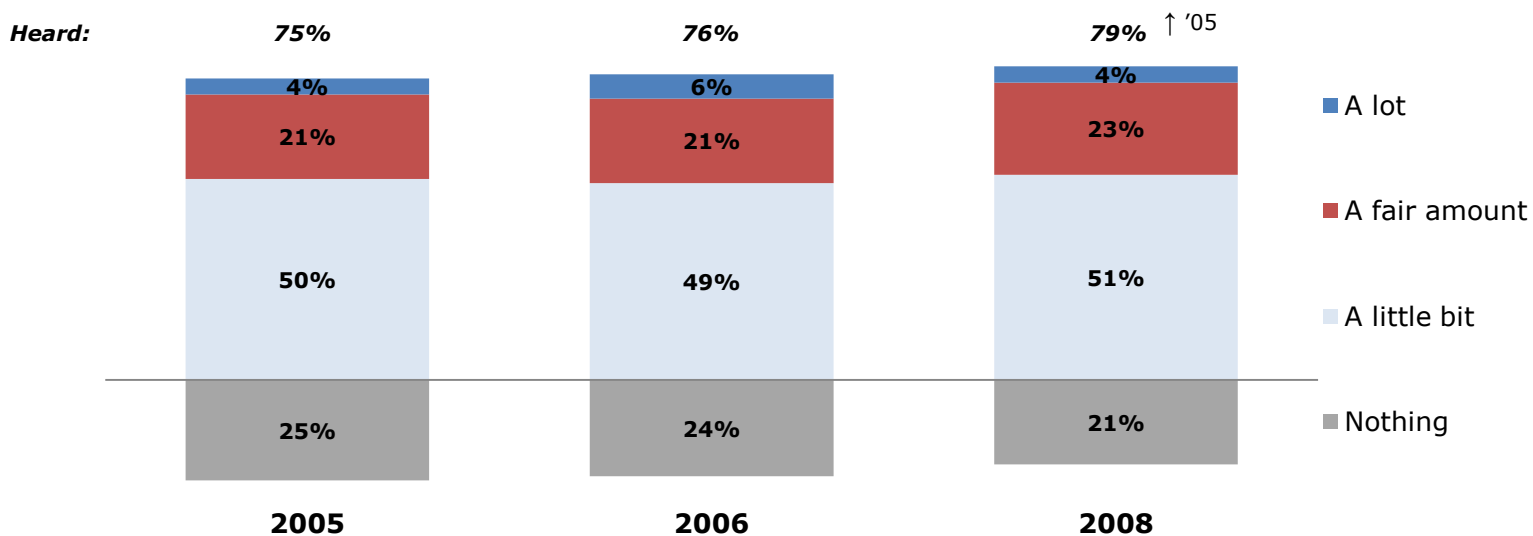
Note: The sample size is indicated on the research findings pages where the question being referenced was asked of a subset of the entire population. If the sample size is not indicated on the page, the question was asked of the entire population.



 **EXCERPTS**

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Awareness of genomics increased over the past two years, with close to 80% now saying they have heard or read about using individual genetic information to understand or optimize health.

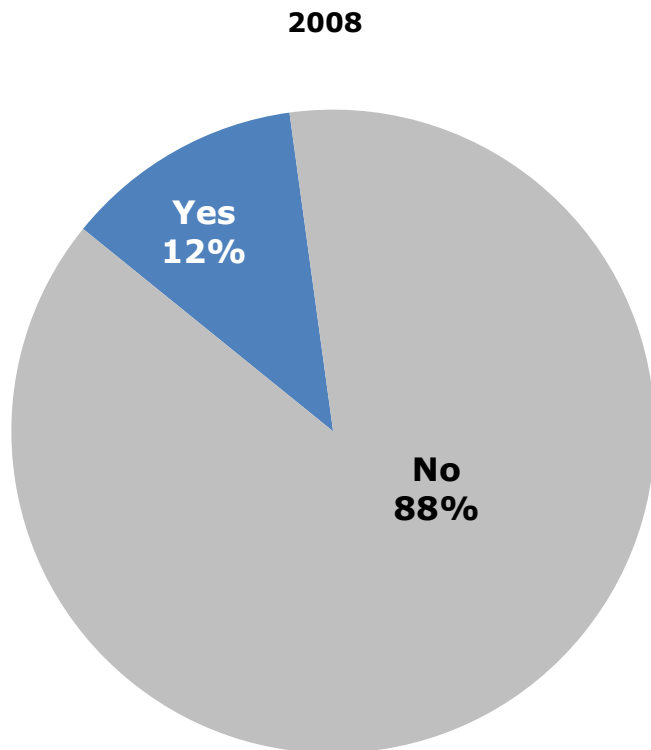


↑ Significant increase in 2008 from the year indicated  
 ↓ Significant decrease in 2008 from the year indicated

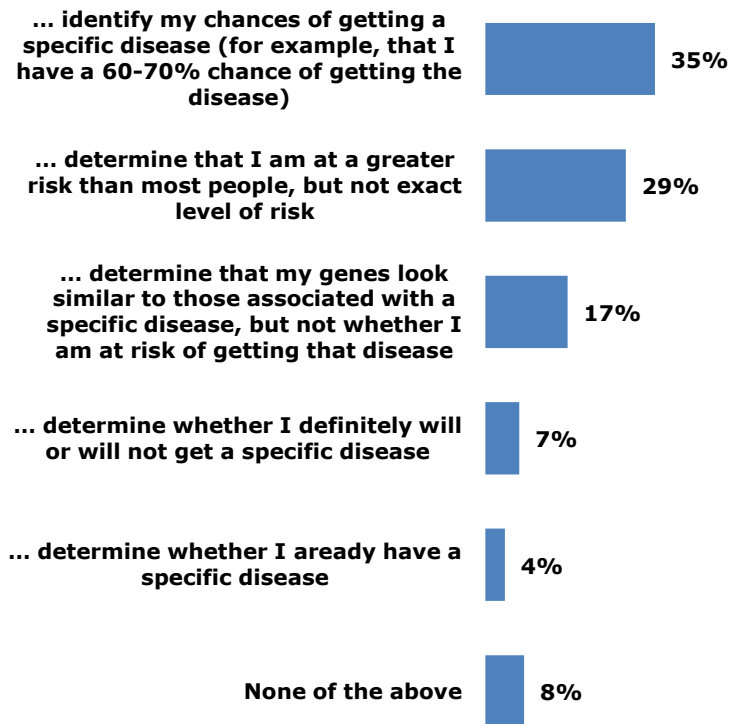
Q22. How much, if at all, have you heard or read about using individual genetic information to understand and optimize health?



A small minority of Americans are aware of DTC genetic testing. Americans are not in agreement regarding what such tests can tell them about their risk for getting diseases.



**I think it means they can ...**



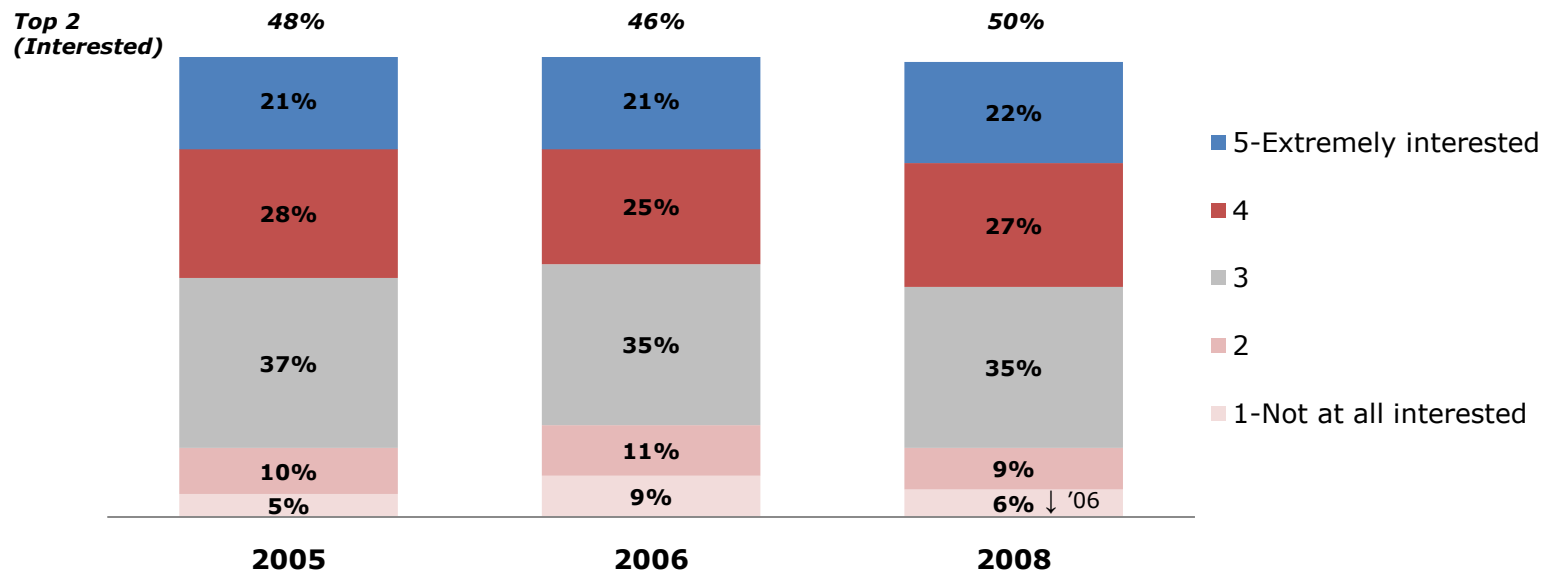
DTC1. Have you seen or heard anything about these "Personal Genome Services"?

DTC2. What do you think it means when these companies say they provide information about your "risk of getting a specific disease based upon your DNA"? (Select all that apply)





Interest in genomics continues to hover at the 50% mark, with a sizeable number of Americans being unwilling to declare themselves as interested or disinterested. Very few classify themselves as being uninterested.



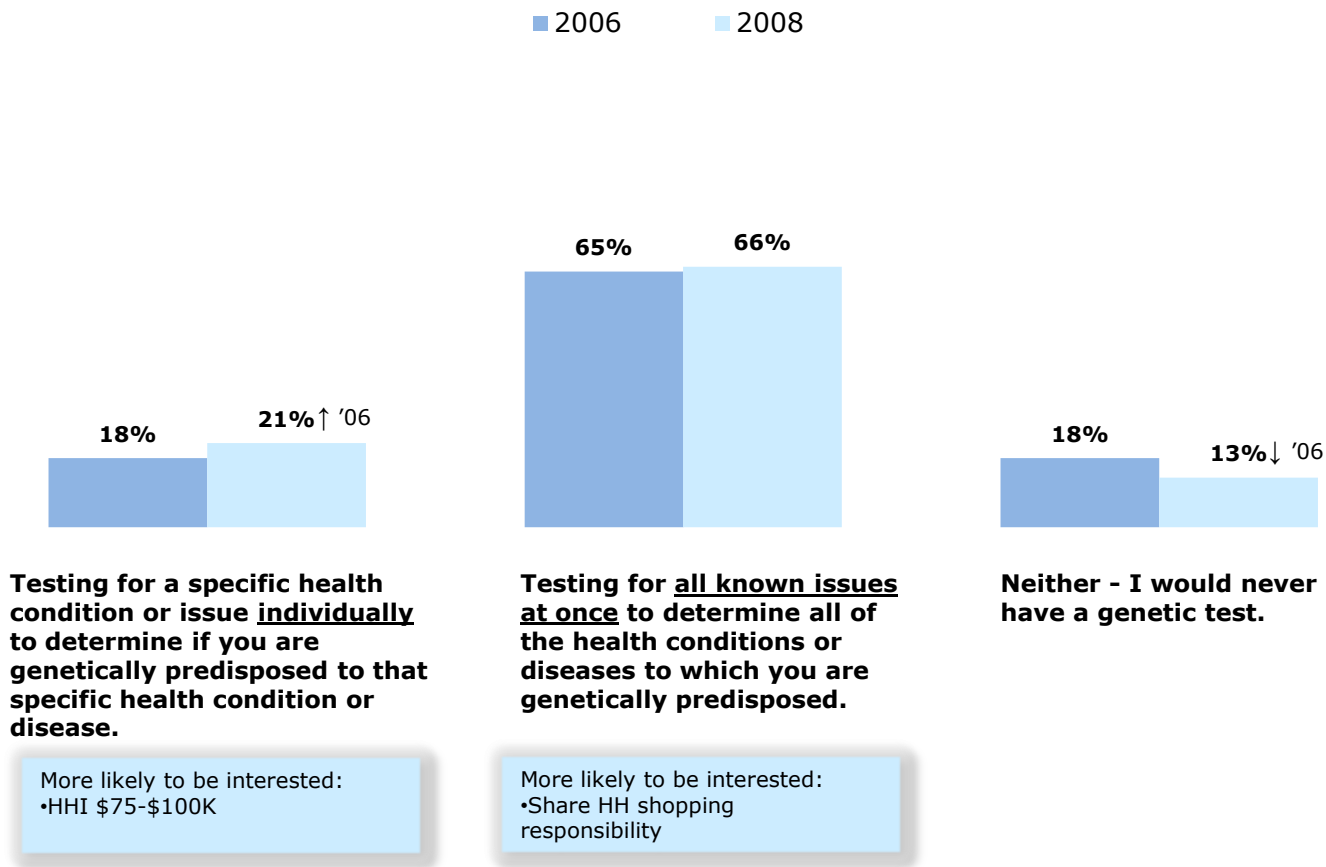
More likely to be interested:  
 •HH income \$100K+  
 •Take 3+ prescriptions

↑ Significant increase in 2008 from the year indicated  
 ↓ Significant decrease in 2008 from the year indicated

Q29. In general, how interested would you be in using your genetic information for the purpose of understanding and optimizing your health?  
 Scale: 1=Not at all interested, 5=Extremely interested



Americans who would have a genetic test show more interest in testing for all known issues at once as opposed to testing for an individual condition or issue.



↑ Significant increase in 2008 from the year indicated  
↓ Significant decrease in 2008 from the year indicated

Q31A. Which of the following options for genetic testing would you be most interested in?



When faced with a list of specific conditions for which they could have a genetic test, most Americans can identify at least one test they would be interested in having (leaving only 9% in the “uninterested” bucket).

**91%**  
of Americans  
would want to  
test for at  
least one  
condition  
*(when given a list of  
40 conditions)*

TOP 10

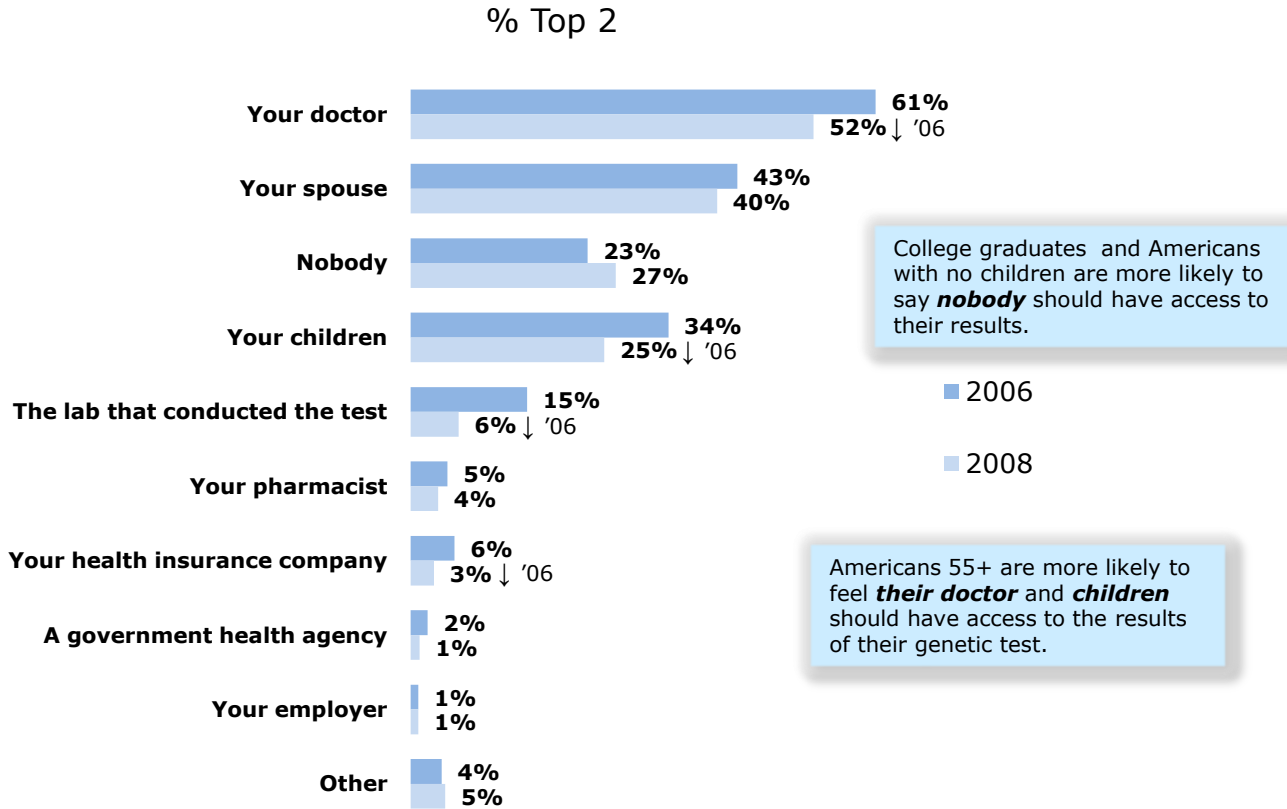
<b>Alzheimer’s</b>	<b>60%</b>	↑ '06
<b>Heart (High Blood Pressure)</b>	<b>57%</b>	↑ '06
<b>Colon Cancer</b>	<b>52%</b>	
<b>Heart (High Cholesterol)</b>	<b>52%</b>	↑ '06
<b>Stroke</b>	<b>50%</b>	↑ '06
<b>Diabetes</b>	<b>49%</b>	↑ '06
<b>Lung Cancer</b>	<b>47%</b>	
<b>Heart (Other)</b>	<b>46%</b>	
<b>Breast Cancer</b>	<b>44%</b>	↑ '06
<b>Parkinson’s Disease</b>	<b>41%</b>	↑ '06
<b>Arthritis</b>	<b>38%</b>	↑ '06
<b>Vision Loss/Blindness</b>	<b>38%</b>	↑ '06

↑ Significant increase in 2008 from the year indicated  
↓ Significant decrease in 2008 from the year indicated

Q31. Assuming there was a test that would indicate whether you were genetically predisposed to each of the following issues, which specific issues would you want to test for? (Check ALL that apply.)



Compared to 2006, Americans are less interested in sharing their results with many resources – including their doctor.

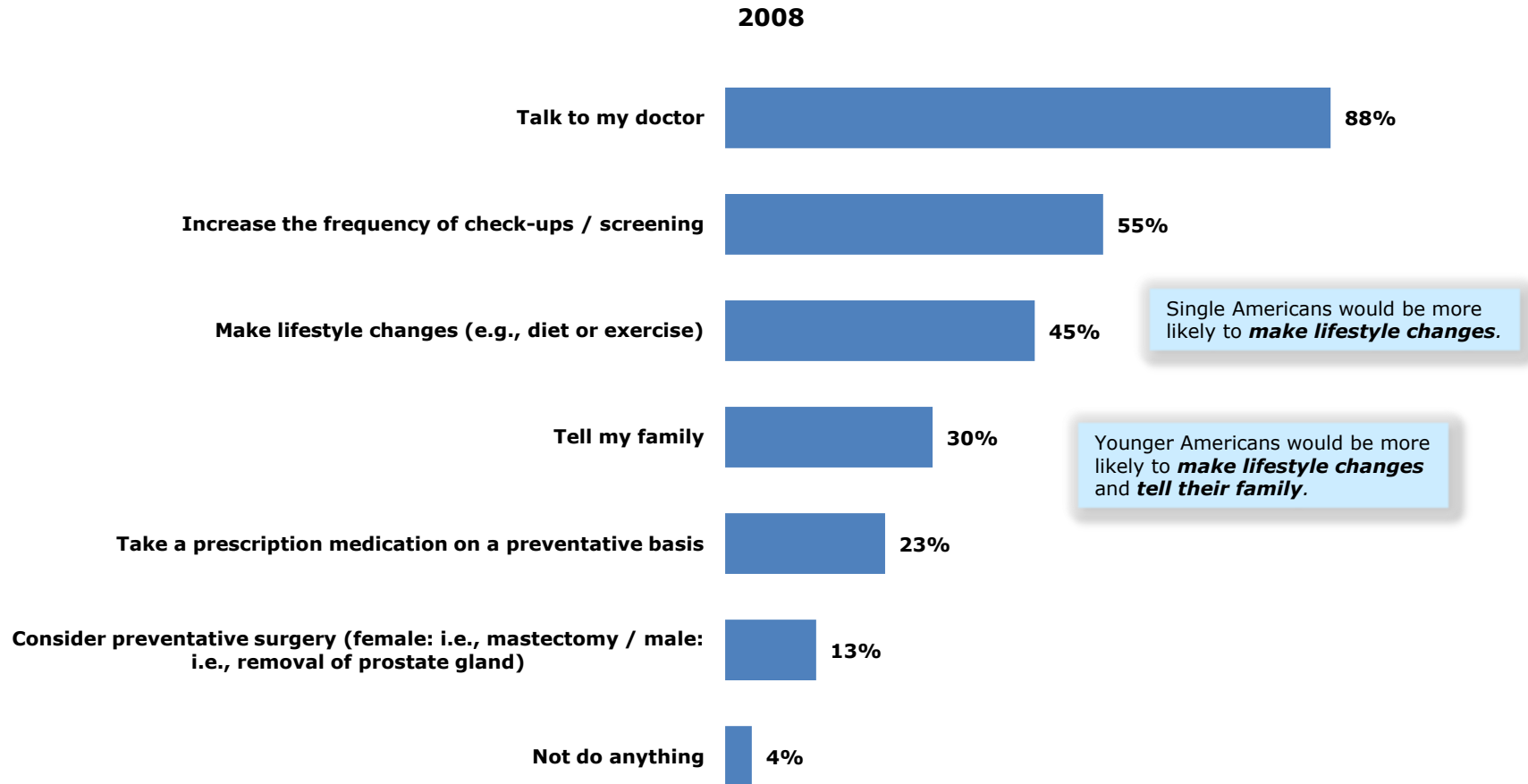


↑ Significant increase in 2008 from the year indicated  
 ↓ Significant decrease in 2008 from the year indicated

Q33. If you were to choose to have a genetic test, who, besides you, should receive a copy of the results of your genetic test? (Check ALL that apply)



However, if a genetic test indicated they were at risk for a specific disease, most would reach out to their doctor (while only one in three would tell their families). About half would make lifestyle changes, and a notable number would consider preventative surgery.



DTC3. Imagine that you decided to have a personalized genetic profile created by one of these testing companies and they informed you that you were at an increased risk of getting [male: prostate / female: breast] cancer. Which of following would you do...? (Select all that apply)





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