Role of Pathologist in the adoption of new tests

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Market Research Activities

Pathologist Interviews

- About 100 interviews conducted by J&J and Beacon Group
  - Six geographies - US, UK, France, Italy, Germany, Japan
  - Across all pathology settings and subspeciality
- Interviewed Clinicians to confirm findings

Conferences/ Lab Visits

- Attended major Pathologist Conferences
  - College of American Pathologist (CAP)
  - American Society for Clinical Pathology (ASCP)
  - Association for Molecular Pathology (AMP)
- Visited various local Hospitals/ Labs
Pathologist Role in Adoption

Drivers
Proactive in recommending the test to the clinician

Consultants
Provides a consultative role to clinician in deciding on new test

Implementers
Pathologist implements the test (Minimal role in creating demand)
Key Findings

Pathologists not drivers of adoption

Drivers ➔ Pathologists are not drivers of adoption. Clinicians are.

Consultants ➔ Pathologists sometimes do provide a consultative role to clinicians

Implementers ➔ Pathologists are mainly implementers of new test
Key Findings - By Geography

Clinicians are the main driver of demand for new tests.

Ex-US pathologists appear to be more influential than US pathologists in this process, but still not the main driver.
Key Findings – By Pathology Specialty

Level of pathologist involvement varies by pathology specialty

- AP – Low automation → high pathologist involvement
- CP – High level of automation → low pathologist involvement
Key Findings – *By Pathology Setting*

- **Community Hospitals**
  - Incentive / primary goal: Meet hospital’s testing needs (viewed as cost center)

- **Private Pathology Groups / Reference Labs**
  - Incentive / primary goal: Drive Profitability

- **Academic Centers**
  - Incentive / primary goal: Research & Teaching (prestige)

The relative willingness to adopt a new test varies by pathology setting, with incentive/primary goals differing significantly, impacting willingness.

- **Community Hospitals**: Meet hospital’s testing needs (viewed as cost center)
- **Private Pathology Groups / Reference Labs**: Drive Profitability
- **Academic Centers**: Research & Teaching (prestige)

Relative willingness to adopt a new test varies among these settings, reflecting their unique goals and motivations.
Other Interesting Findings

- Experts, not key opinion leaders

- Limited opportunity and interest in off site training / workshops

- Pathology Professional Associations
  - Source of learning and awareness versus endorsement
  - Limited clinical practice guidelines coming from CAP or ASCP

- Industry Partnerships
  - Being involved in the product development / pre-launch clinical testing appears to encourage adoption
  - Pathologists generally welcome being asked for comments and feedback by companies
Summary

- Pathologists are generally not drivers in the adoption of new diagnostics tests
  - May be more influential in Europe and Japan (“consultant” to the clinician) than in the US (“implementers”)

- Pathologists are critical to implementation decisions

- From an industry perspective it is imperative to understand **Pathology lab settings** and the impact to **pathology revenue flow** and is critical to minimize barriers to adoption & implementation of new diagnostic tests
Futurescape of Pathology