

CAP FOUNDATION
CONFERENCE SERIES III

Futurescape of Pathology



Role of Pathologist in the adoption of new tests

Mark D. Myslinski
President and CEO
RedPath Integrated Pathology, Inc.



Market Research Activities

Pathologist Interviews

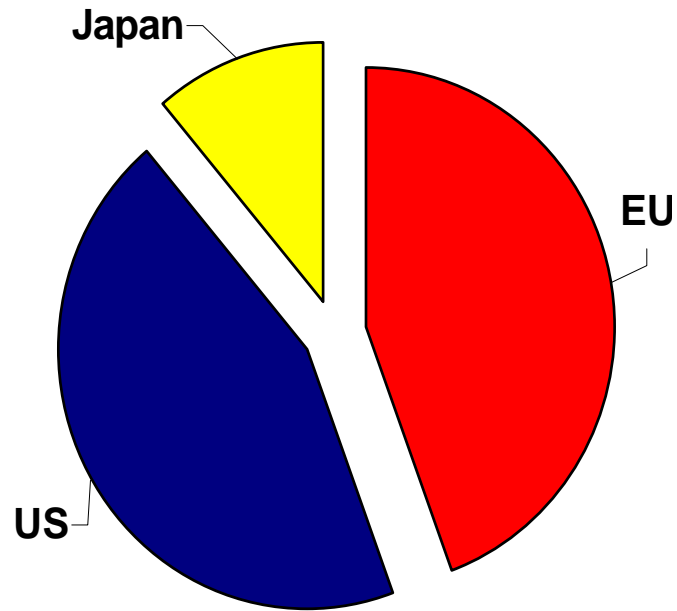
- About 100 interviews conducted by J&J and Beacon Group
 - Six geographies - US, UK, France, Italy, Germany, Japan
 - Across all pathology settings and subspeciality
- Interviewed Clinicians to confirm findings

Conferences/ Lab Visits

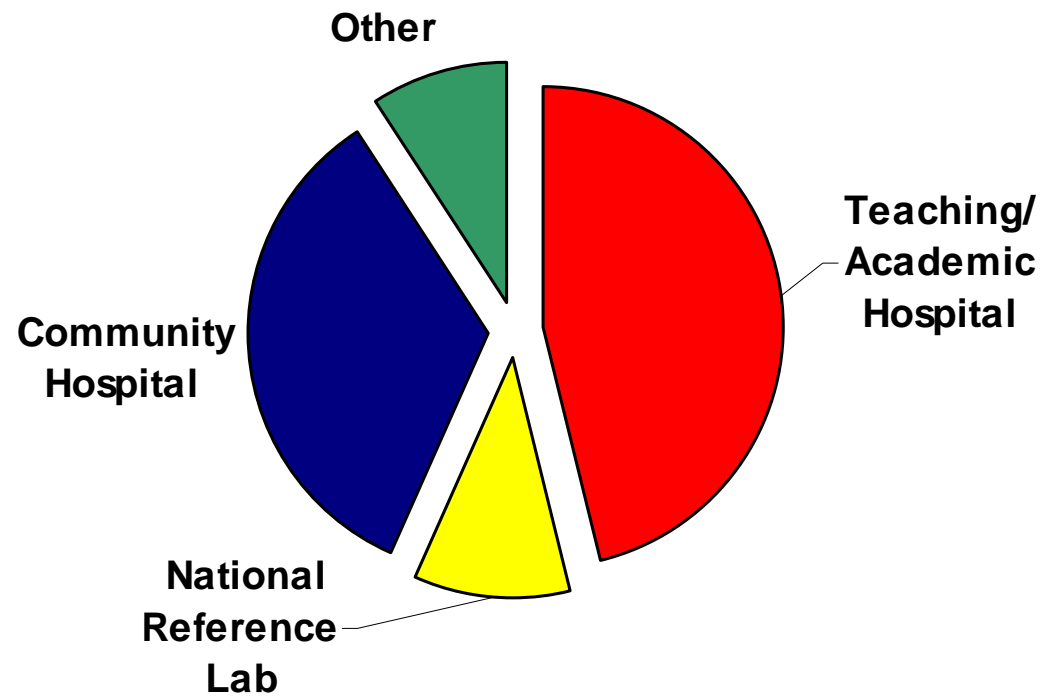
- Attended major Pathologist Conferences
 - College of American Pathologist (CAP)
 - American Society for Clinical Pathology (ASCP)
 - Association for Molecular Pathology (AMP)
- Visited various local Hospitals/ Labs

Survey Demographics

By Geography



By Setting Type



Pathologist Role in Adoption

Drivers



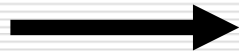
Proactive in recommending the test to the clinician

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



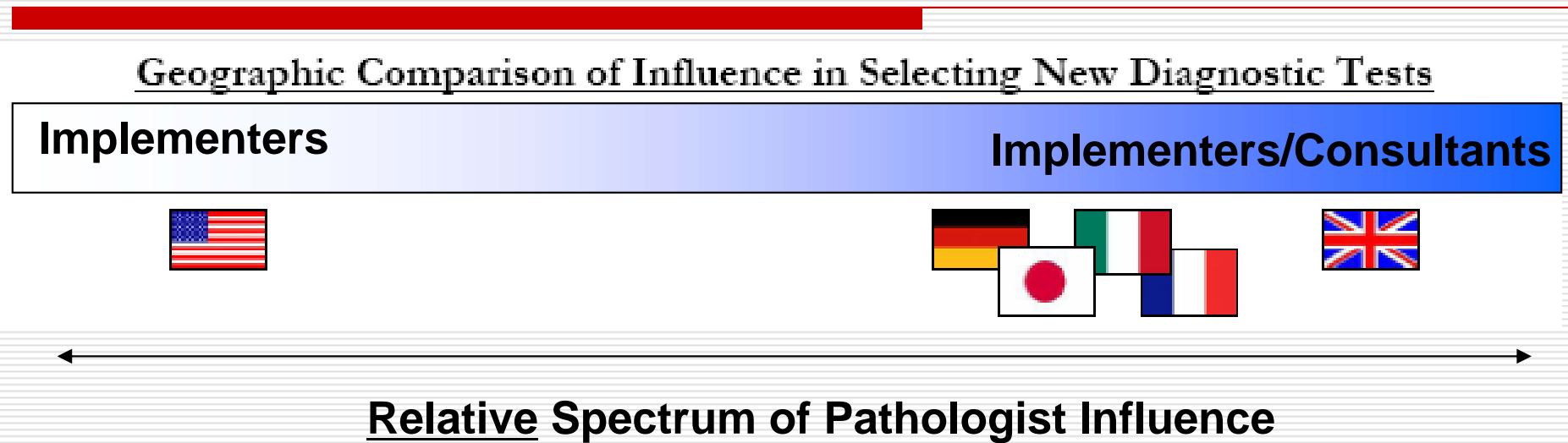
Pathologists sometimes do provide a consultative role to clinicians

Implementers



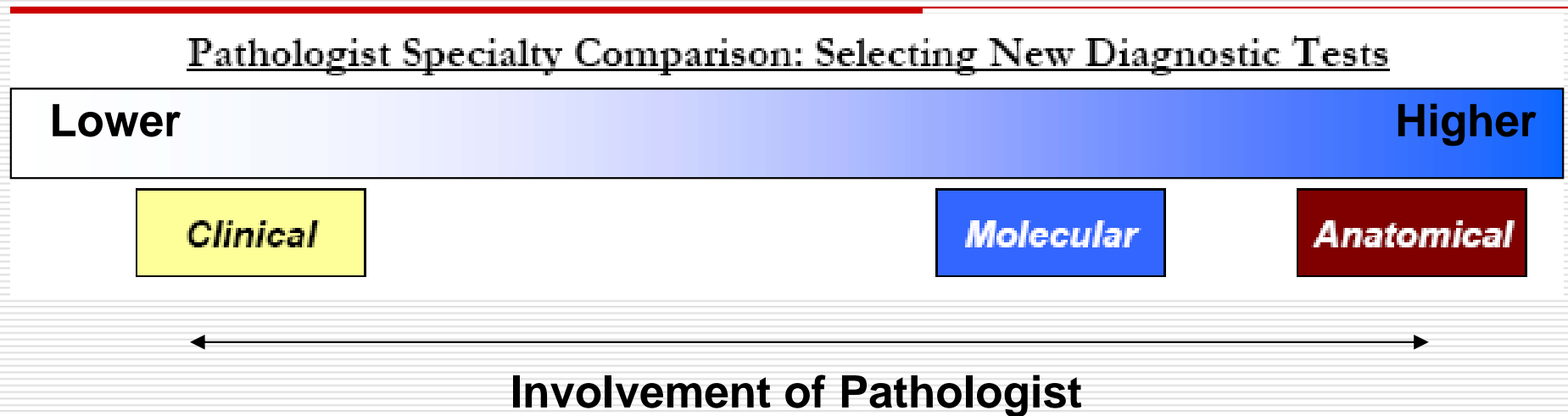
Pathologists are mainly implementers of new test

Key Findings- *By Geography*



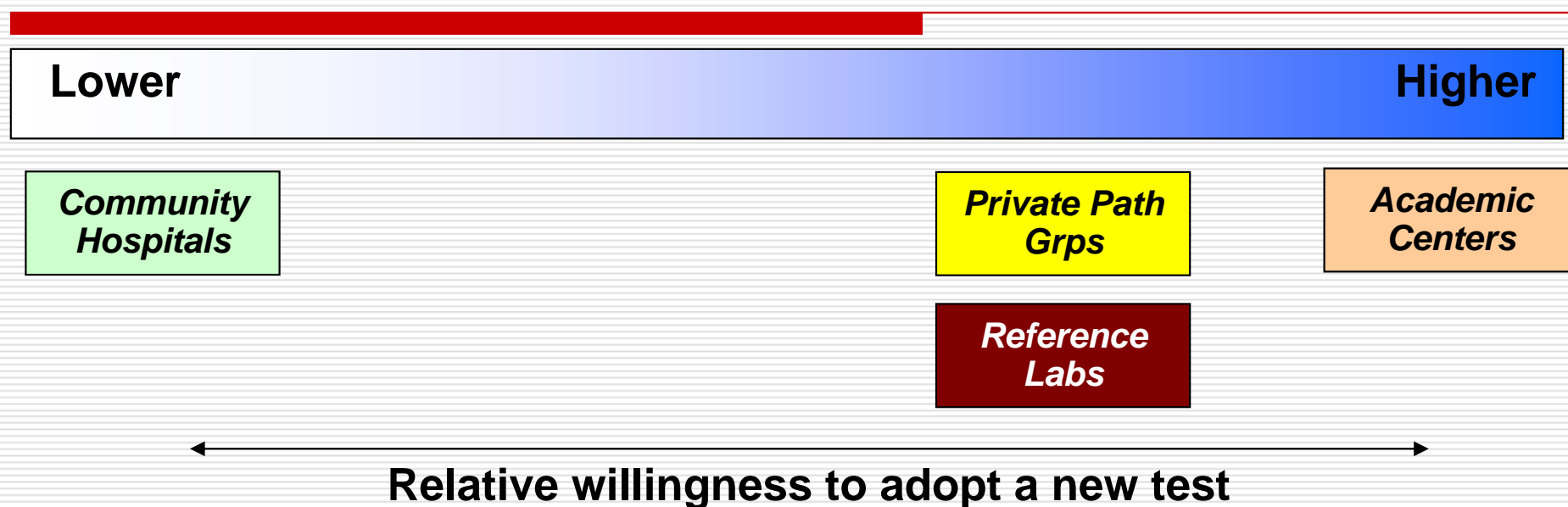
- Clinicians are the main driver of demand for new tests.
- Ex-US pathologists appear to be more influential than US pathologists in this process, but still not the main driver.

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*



- Incentive / primary goal for each of the settings is different → impacts willingness to adopt a new test
 - Community Hospitals – Meet hospital’s testing needs (viewed as cost center)
 - Private Pathology Groups / Reference Labs – Drive Profitability
 - Academic Centers – Research & Teaching (prestige)

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

CAP FOUNDATION
CONFERENCE SERIES III

Futurescape of Pathology

