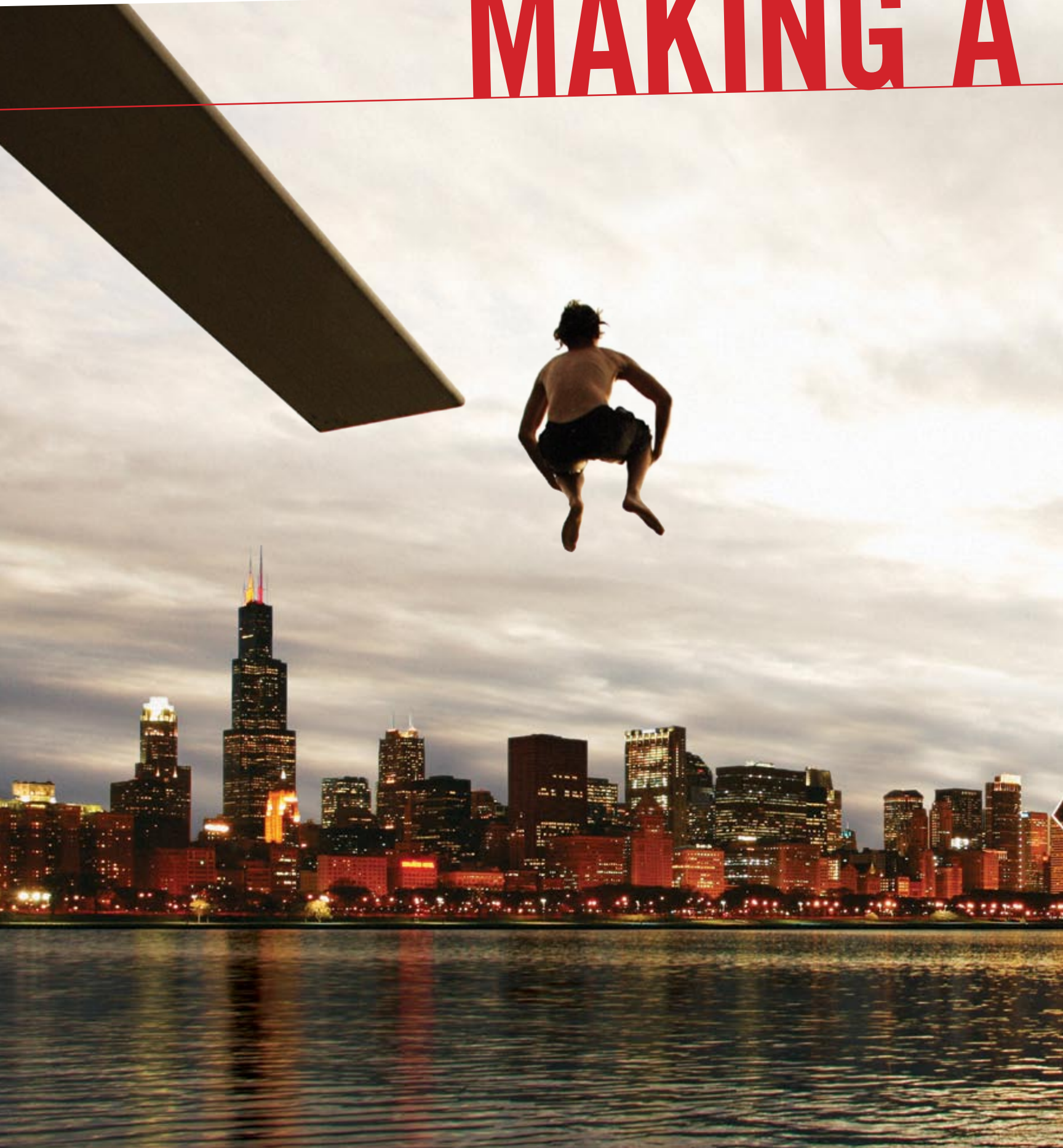


MAKING A



SPLASH AT ASCO

by Peter Carlin and Don Stark, Market Strategies International

- With oncology entering an exciting period of growth and innovation, the future
- success of many oncology companies will be dependent on how well they per-
- form at the annual meeting of ASCO. Oncologists were asked to rate exhibit
- booths at this year's meeting in an exclusive MSI survey. Results are tallied and
- presented here, but will they affect next year's booths?

Introduction

Oncology companies have a lot riding on their performance at major medical meetings like the American Society of Clinical Oncology (ASCO). With millions of dollars being spent on exhibit booths, symposia, educational events, marketing, sales, with medical staff participating, and with lots

of giveaways, oncology companies continue to invest significantly at ASCO. With oncology entering its most exciting period of global growth and innovation, the future success of many large and small oncology companies will be dependent on how well they perform at the meeting. [cont. on pg 34 >>](#)





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Rating the Booths

This year's ASCO, which took place in Chicago in June, had over 30,000 attendees from all over the world. Through an internet-based questionnaire, Market Strategies International (MSI) interviewed 100 U.S. and 100 international oncologists who attended the meeting. Oncologists were asked to rate biotech and pharma companies on a number of overall "top-of-mind" conference metrics, as well as performance measures, focused solely on the companies' exhibit booths.

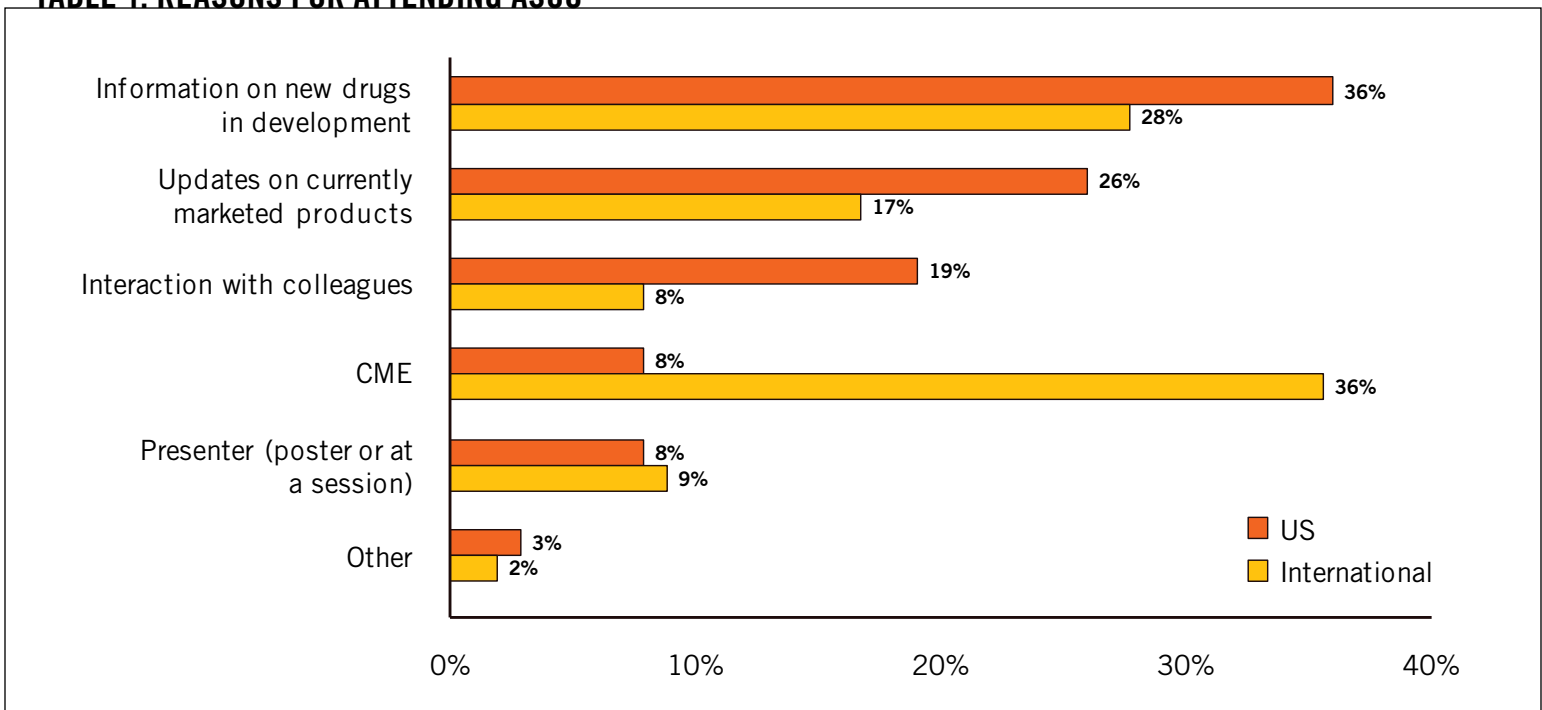
Our research uncovered a number of insights. Notwithstanding the long lines for "giveaways," most physicians came to ASCO to learn about either the products they use most often in their practice or to learn about new

products in development. As Table 1 shows, U.S. and international oncologists identified both new and current products as significant reasons for attending ASCO.

A company's performance at ASCO is driven by the products or pipeline it showcases. Genentech continued to dominate ASCO—as it has since 2005 when Herceptin® and Avastin® were the "belles of the ball"—with the most visited commercial booth. Ranked number one on 5 of the 11 exhibit-booth measures used by MSI, Genentech was identified as the company that did the best job of meeting physicians' needs for information on its current and pipeline products.

Roche, which finished 9th in the U.S. for overall presence, was rated as the top per-

TABLE 1. REASONS FOR ATTENDING ASCO



Source: Market Strategies International



former by international oncologists, thereby signaling Roche's relationship with Genentech and its products from physicians around the world.

Based on overall performance, the final standings of all companies evaluated at ASCO are shown in Table 2.

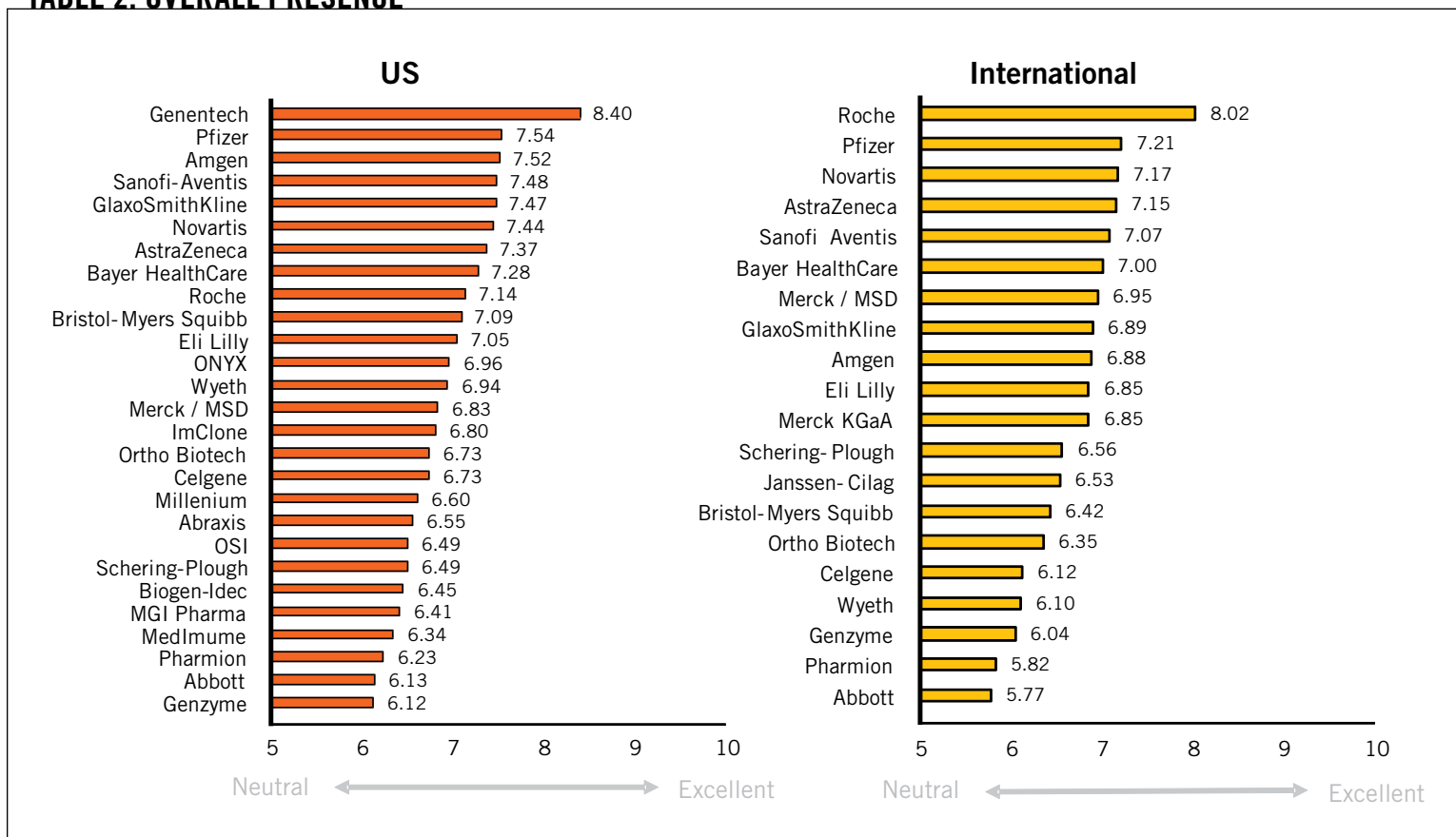
Big Pharma Gains Traction

As OBR reported last year, the big news from ASCO 2006 was the entry of big pharma into the battle against cancer. The big news from ASCO 2007 is that big pharma compa-



nies like Pfizer are starting to gain traction in oncology. Once they fully understand that the oncology marketplace is driven by different key drivers than the [cont. on pg 36 >>](#)

TABLE 2. OVERALL PRESENCE



Source: Market Strategies International



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mass market sectors, they will begin to more aggressively challenge the top companies. Biotechs like Genentech, Amgen, Celgene, and Millennium will increasingly face strong challenges from big Pharma's deep pockets and ASCO will be the central battleground for these battles.

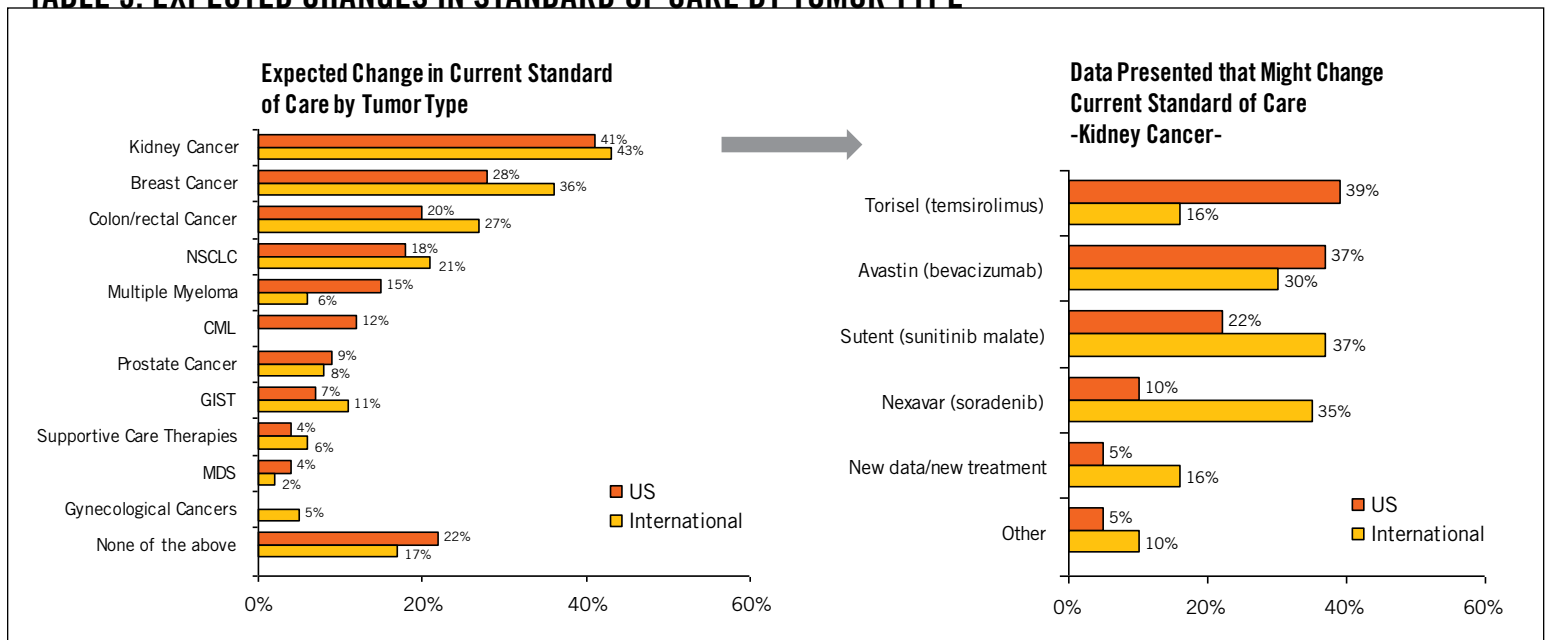
Data presented on Torisel®, Avastin®, Sutent®, and Nexavar® are expected to have an impact on the standard of care for renal cell carcinoma (RCC). While the expected changes in care aren't as dramatic as those indicated for the treatment of breast cancer (Herceptin) and NSCLC (Avastin) in 2005, they are significant nonetheless. Just as Genentech was the clear winner at ASCO 2005, companies like Pfizer and Bayer capitalized on their RCC focus. Bayer broke into the top 10 (finishing

8th in the U.S. and 6th internationally), while Pfizer finished second in both the U.S. and international rankings.

What to Think About for Next Year

Industry-sponsored symposia are a mainstay of oncology company activities at ASCO each year and 2007 was no different. But if a company's primary audience is U.S.-based oncologists and the information being presented is not breaking news or focused on the company's pipeline products, their investment may have a low return on physician involvement. Only a small proportion of U.S.-based oncologists attended an industry-sponsored symposia in 2007 compared with physicians from outside the U.S. (16% vs. 41%, respectively). In addition, if a U.S. physician did attend a company-sponsored symposium, he/

TABLE 3. EXPECTED CHANGES IN STANDARD OF CARE BY TUMOR TYPE



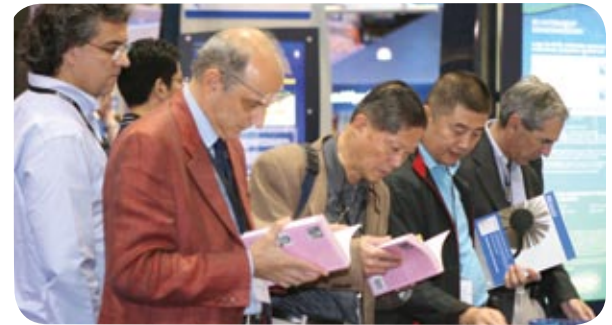
Source: Market Strategies International



she usually only attended one, while over half the physicians from outside the U.S. attended two or more.

Finally, given that ASCO is setting a lower maximum booth size beginning in 2008, all companies should consider evaluating their booth activities. Since U.S. physicians are most interested in learning new information about both pipeline and marketed products, including the science behind them, a company with a significant U.S. market focus may want to emphasize those topics at their 2008 exhibit.

On the other hand, a company that has a significant oncology focus outside the U.S. may want to focus more on CME activities, which international physicians mention as their primary reason for attending ASCO. Since giveaways that are not scientifically focused do little to attract U.S. physicians to the exhibits (in fact, the crowds generated by attractive giveaways may actually be counterproductive in attracting U.S. physicians), companies may also want to rethink the nature of the giveaways and tailor them to the



oncology audience they are most interested in attracting.

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About Market Strategies International

Established in 1989, MSI goes above and beyond in delivering unparalleled insight, innovative tools and unique solutions that positively impact clients' ability to succeed. MSI is the 24th largest market research firm worldwide according to "Honomichl Top Global 25," published in the August, 2006 issue of Marketing News. Corporate headquarters are located in Livonia, MI with regional offices in: Portland, OR; Washington DC; New Providence, NJ; and Atlanta, GA. For more information, please visit www.marketstrategies.com.

