



American Association of Diabetes Educators - 41st Annual Meeting

August 6-9, 2014; Orlando, FL; Full Report - Exhibit Hall - Draft

Executive Highlights

This year's 199 exhibitors represented a 15% decline from the 233 companies and organizations in 2013; however, we did see booths from 33 first-time exhibitors, including Regeneron Pharmaceuticals, GSK, and iHealth Lab. Our coverage includes the following companies: Abbott, AstraZeneca, Bayer, BD, Boehringer Ingelheim, Dexcom, Genteel, GSK, Insulet, J&J, Lilly, Medtronic, Merck, Novo Nordisk, Roche, and Tandem. Talks included in this report that were not covered in our daily highlights reports are highlighted in [blue](#).

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Exhibit Hall

Abbott

Abbott returned to the exhibit hall after choosing not to put forth a booth at ADA 2014. Located at the hall entrance, Abbott's enormous booth featured its signature yellow panels and large, bright yellow circular banners reaching toward the ceiling. It was hard to miss their sales representatives, too, who were very approachable for educators in their bright yellow shirts. The center of the booth was taken up by a large bar, allowing attendees to refresh themselves with a drink (non-alcoholic!) and rest their legs. The exterior

of the exhibit featured multiple booths with impressive outward-facing touchscreen monitors highlighting the entire line of FreeStyle products. Perhaps given the challenging economic climate in the US, representatives were highlighting for attendees of Abbott's existing FreeStyle Promise program that provides patients with a free meter and "instant savings" on tests strips (as low as a \$15 test strip co-pay per month) - we have heard excellent patient feedback from those who use this program. Educators not as familiar with Abbott's "ZipWik" strip technology received cool demos showing the extent to which the technology minimized the amount of blood needed to make a reading (only 0.3 µl).

AstraZeneca

AZ fielded the largest booth in the hall. For a booth of its size, there was relatively little in the way of static displays, with just a few displays and desks at the corners of the booth. The major feature was a central product theater stage with comfy white seats where speakers gave scheduled presentations on the SGLT-2 inhibitor Farxiga (dapagliflozin) and the new [Bydureon pen](#). AADE is the coming-out party for the Bydureon pen, which was approved in March but has not yet launched - the device encapsulates the entire reconstitution process within the device, representing a significant step up from the Bydureon kit. Overall, AZ's booth emphasized the breadth of its portfolio more than any single product, with some displays encouraging educators to take a stand against high A1cs while individualizing therapy for their patients.

Bayer

We were pleased to see Bayer's presence at the exhibit hall after the company's absence at ADA's exhibit hall. The booth underwent a major stylistic redesign since last year's AADE, as the brown and black shades were replaced by a much brighter and striking blue and white motif. A small bar at the rear of the exhibit offered attendees beverages, while stations set against shimmering white curtains advertised the Contour Next meter. A walk around the booth revealed a demo stage at the rear, where representatives stressed the convenience of the meter with two language features, audible test reminders, and "second chance testing" (applying more blood without wasting test strips). Adjacent to the coffee bar was a lounge space, equipped with a long couch, a few chairs, and a coffee table, providing fatigued attendees a location to relax, check their email, or hold a conversation.

BD

BD's booth was prominently located at the front of the exhibit hall and was particularly busy with foot traffic. During AADE, the company [announced](#) the launch of the AutoShield Duo pen needle, and this product was the clear focus of the exhibit. A large-scale replica of the pen needle marked the entrance to the booth, while two-story panels surrounding the exterior proclaimed that, "The future of pen needles is here." BD's representatives were eager to demo the device at multiple stations, speaking enthusiastically about the first and only patented dual front and back-end shielded pen needle ("[the first true innovation in a pen needle in a long, long time](#)"); the design ensures the needle is never exposed in order to provide greater safety both before and after injection. Representatives also highlighted the convenience of the device (5 mm, 30 gauge) - the tactile feedback, the "audible click," and the red indicator - that mark a successful injection (which attendees got to confirm for themselves). Prominent blue signage also noted that the device is covered by "virtually all insurance plans at the preferred co-pay" and fits all leading insulin pens. Meanwhile, just as at [BD's ADA booth](#), the center of the exhibit was devoted to an elevated stage that featured a lipohypertrophy demo, where "Lipo Larry" was spread out on an examination table. This dummy invited attendees to feel the lipohypertrophy on Larry as reps emphasized the importance of rotating injection location; accompanying monitors highlighted that [appropriate rotation can allow patients to use up to 15 fewer units of insulin/day](#). We felt this was really valuable to share with educators and hope patients have a chance to learn more on this front as well. More notably, although we missed it on day #1, panels also announced a daily live demo - similar to that at [EASD 2013](#) - that we are sure attracted a significant number of attendees.

Boehringer Ingelheim

BI's fairly modest-sized booth featured the same sleek white appearance we saw at [ADA](#) (in contrast to the signature exuberant purple theme of previous years). Rectangular screens provided safety and efficacy data

on Tradjenta and Jentadueto, and two banners highlighted the [recent approval](#) of Jardiance (empagliflozin), the third SGLT-2 inhibitor to gain approval in the US behind J&J's Invokana (canagliflozin) and AZ's Farxiga (dapagliflozin).

Dexcom

After a relatively more expansive display at ADA, Dexcom reverted to a more familiar design for AADE: the small yet stylish exhibit was nestled toward the side of the hall, offering an open floor plan with plenty of room for seating. Attendees could grab a beverage at a small coffee bar, while a monitor behind the counter displayed a video of what appeared to be testimonials of athletes - a golfer and BMX rider - showcasing Dexcom's G4 Platinum CGM. Signage above the booth announced the company's slogan, "One Step Ahead," while three colorful ground-level panels highlighted the accuracy of the Dexcom G4 Platinum ("lowest Mean ARD in the industry") and the device's [pediatric approval](#); the latter seemed to successfully tug at attendee heartstrings with a picture of a young girl holding a G4 in one hand and a teddy bear in the other. In speaking with representatives, the exhibit's main news was the [approval](#) of the Professional version of the G4 Platinum and the even more [recently announced](#) integration partnership with Asante.

Genteel

Though Genteel's small booth was nestled toward the side of the exhibit hall, that did not stop a sizable crowd from eagerly gathering to test the company's flagship product, a "100% pain-free" blood glucose test. Large signage advertising the slogan - "No More Ouch!" - framed the front of the exhibit while a display table at the rear presented the device. The "painless" technology works by controlling blood draw with six interchangeable "Contact Tips" of varying thickness that block the travel of the lancet into the skin; by choosing the appropriate tip for their skin - a learning curve of five minutes, according to representatives - patients can eliminate contact between the lancet and pain nerves. The device also features a vibration mechanism intended to block pain signals while generating lancing speeds up to "four times faster" (0.018 seconds) than conventional spring-loaded mechanisms; after lancing, the device applies a vacuum to the skin intended to "soothe" pain nerves and facilitate blood draw through a shallower, smaller lance site. The device is approved for alternate site testing and works with the majority of FDA-approved square lancets. The marketing campaign was clearly directed toward children, featuring multi-colored lancers - along with a variety of stickers - in an attempt to give the device a benign look, reducing the "trauma" associated with testing. While we love the ingenuity of the product and the unmet need it seeks to fulfill, the significant size (about four times bigger than a conventional lancing device) will deter many patients that perceive it as particularly indiscrete. In testing a demonstration device at home, we also found it incredibly hard to learn and setup; it most certainly did not pass the "no-instruction manual test" we apply to every new diabetes device (admittedly a hard test for some). Further details on the product can be accessed [here](#).

GSK

The fairly low-key booth belied the company's exciting recent news: the launch of the once-weekly GLP-1 agonist Tanzeum (albiglutide) (in line with the company's [2Q14 update](#) in late July. Four sets of static displays on the side of the booth displayed the product insert, while a set of information desks at the corner of the booth allowed representatives to catch passerby to tell them about the new drug and demo the device and administration protocol. Tanzeum was [approved](#) in the US in April, and at GSK's medical affairs booth at [ADA](#) we got to see a demo of the 30 mg pen, which encapsulates the reconstitution process within one device (although the process takes slightly upwards of 15 minutes for the 30 mg pen and slightly upwards of half an hour for the 50 mg pen, most of that time being wait time during which patients can do other things). The [FDA label](#) for Tanzeum has a pictorial of the administration process. The booth layout appeared to be fairly conserved from ADA, featuring a few chairs and couches, a rich purple carpet, and granola for attendees.

Insulet

Insulet's modest exhibit was stationed toward one side of the exhibit hall, though that did not stop a host of educators from stopping by to inquire about the company's second-gen OmniPod. The booth's message was clear, as a poster proclaimed the benefits of the device: "Easy to use, wearable, and waterproof." In

particular, representatives highlighted the latter, distributing handouts with data illustrating the elevation in blood glucose that comes with disconnecting from a durable pump during a shower (or other water activities). Images of patients on surrounding panels displayed the OmniPod on the triceps, putting a clear emphasis on the product's small size and high wearability. Eager attendees could step up to one of three podiums and receive a demo of the OmniPod. As in the past, the booth even featured a poster for solid chocolate OmniPods and provided attendees with copies of a Sam Talbot-authored cookbook ("The Sweet Life") as a free giveaway. There was no mention of the company's [recent announcement](#) that the integration partnership with Dexcom is back on.

J&J

J&J's booth was hard to miss thanks to the enormous ring with its logo suspended from the ceiling and the artistic chandelier-like structure lighting up the center of the exhibit. The success of the SGLT-2 inhibitor Invokana (we estimated sales to be \$84-93 million in [2Q14](#)) was in line with how J&J used their booth space, as about two-thirds of the exhibit real estate was devoted to touchscreens explaining the drug's mechanism of action and favorable efficacy profile. Sales representatives handing out pamphlets asking "What Have the Kidneys Ever Done for Type 2 Diabetes?" were eager to discuss the unique benefits of SGLT-2 inhibitors with providers; one representative said that most diabetes educators she had spoken with were very familiar with Invokana. While Invokana was clearly the focus of the exhibit, LifeScan/Animas still had a substantial presence. Educators who stopped by the booth could receive stuffed foxes intended to aid in infusion set insertion demonstrations for the OneTouch Ping insulin pump. As in previous years, Animas pumps floated in water to demonstrate the water resistance feature. Representatives also highlighted Janssen's Care4Today Mobile Health Manager, a mobile app that reminds patients when to take their medications, complete with pictures of the pills. As in the past, the booth also featured some artistic touches, including kidney-shaped easels dedicated to "advocate art" and a stand with large "post-it note" cubes asking attendees, "What challenges will the next breakthrough in diabetes help solve?" [In our view, adherence, clinical inertia, and ongoing patient support.]

Lilly

Lilly's booth had a lot going on, with its characteristic house theme in full force. We were drawn to an interactive wall of tablet screens on the far side of the booth, which allowed attendees to explore Lilly R&D highlights. A number of other Lilly programs and partnerships were highlighted as well, including joint efforts with Disney and NASCAR as well as its Diabetes Emergency Plan and [Diabetes Journeys Awards](#) programs. On the product front, small portions of the booth were allocated to Lilly/BI's Tradjenta (linagliptin) and Lilly's insulin and insulin pen portfolio. We noticed that Humulin U500 (Lilly's highly concentrated human insulin formulation) received a wall of its own - during Lilly's recent [2Q14 update](#) management noted that Humulin U500 was a major driver of Humulin franchise growth.

Medtronic

Medtronic's typically expansive booth was located at the entrance of the exhibit hall and featured floating circular panels reaching toward the ceiling. Representatives walked us through the Threshold Suspend feature of the MiniMed 530G with Enlite, which was displayed prominently at a kiosk toward the side of the booth. Located centrally within the exhibit was also a line of experimental Medtronic clothing and accessories, including colorful and stylish travelling cases alongside athletic wear with pump-sized pockets sewn directly into the fabric. Other pipeline items mentioned during the company's [Analyst Day](#) - the MiniMed Flex "hybrid pump," the Enlite 3 sensor, and the type 2 diabetes business - were not present in the booth.

Merck

Positioned close to the exhibit hall entrance, we quickly spotted Merck's booth from the logo on a large hanging ring suspended from the ceiling. The expansive, light-hearted exhibit featured a frozen yogurt machine - quite popular among attendees - and many illuminated monitors, showcasing images of various smiling patients. The exhibit also highlighted safety and efficacy data of its market-leading Januvia (sitagliptin) franchise, with separate walls focused on Januvia and Janumet (combination sitagliptin and

metformin) - we heard the latest on these drugs during Merck's [2Q14 update](#); these walls featured slogans such as, "helping your patients on their lifelong journey" (similar to the company's booth at [ADA](#)). Meanwhile, other screens throughout the booth offered support resources to patients and providers, while representatives provided attendees with diabetes recipe booklets.

Novo Nordisk

The sleek white booth occupied a relatively modestly sized footprint for the company, but it still seemed plenty spacious given the focus on three of its offerings: the GLP-1 agonist Victoza (liraglutide) and its major insulins Novolog (insulin aspart) and Levemir (insulin detemir). Sleek white structures with purple accent lighting and plentiful large displays set a high-tech theme. Much of the messaging was conserved from the company's [ADA booth](#), including the now characteristic tree root motif for Victoza. A portion of the booth was also dedicated to Novo Nordisk's signature conference 5K, something the company does an amazing job spearheading at the major diabetes conferences.

Roche

Roche was back on the exhibit hall floor after its absence from the ADA 2014 hall. The company's signature navy blue paneling arched over the booth, held up by what appeared to be blue, stick-figure-esque people. The open floor plan featured multiple white tables furnished with chairs and baskets of oranges. Roche heavily featured its new slogan, "Now patients can enjoy the meal without worrying about the math," as the booth focused on the company's new Accu-Chek Aviva Expert BGM - the meter was launched earlier this year and Roche is promoting it as the "first and only" meter with a built-in bolus calculator. [Though this is true "in the US," the version of the Abbott FreeStyle InsulinX available outside the US does include a built-in bolus calculator, which makes Roche's language somewhat misleading.] The booth featured multiple posters of the Aviva Expert against a background of alphabet soup imagery that emphasized the difficulties of bolus calculation - this was quite apt from a patient perspective. Representatives were quick to point us toward a demo of the Aviva Expert located at a white counter at the center of the booth that allowed attendees themselves to interact with the bolus calculator. To the right of this counter, attendees could also spin a large trundle in order to win a variety of prizes ranging from imitation food props to measuring cups; the eye-catching promotion seemed to attract a host of foot traffic throughout the conference.

Tandem

Tandem's impressively high paneling was front and center at the entrance to the exhibit hall, reprising its signature modern, wood-floored look. Glassy paneling surrounding the booth displayed cases showcasing the t:slim insulin pump and accessories. Meanwhile, touchscreen monitors allowed attendees to experiment with the device's user-friendly interface and to walk through the process of initiating a bolus. As expected, representatives highlighted the recent PMA submitted to the FDA seeking approval of its t:slim insulin pump integrated with the Dexcom G4 Platinum CGM (learn more in our coverage of Tandem's [2Q14 update](#)). A dedicated kiosk also displayed the t:connect diabetes management software, allowing attendees to mouse through the application at a small computer station. Alternative kiosks featured seating for attendees to rest and look through handouts detailing high scores for the t:slim in pump satisfaction research from San Francisco-based market research company, dQ&A (Contact richard.wood@d-ga.com for more details).

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