

The Science of Healthcare Professional Meetings

A 2018 follow-up study validating Ashfield's 2016 Future of Meetings white paper, comparing and contrasting the perceptions of healthcare professionals (HCPs) and diving deeper into the ongoing evolution of the medical meetings landscape.

How the HCP meetings landscape is evolving

In 2016, Ashfield published the results of an independent study that explored what drives healthcare professionals (HCPs) to attend scientific meetings, as well as what criteria they use to evaluate their attendance and how they see the future of scientific meetings evolving.

The 2016 study established how scientific meetings fit into physicians' overall learning journeys. It exposed learning preferences and preferred channels for accessing scientific content and educational materials. We were not only able to identify a number of key challenges that HCPs face when attending medical meetings, but we also developed a meaningful understanding of their expectations towards meeting attendance, as well as their evaluation processes and levels of engagement during those meetings.

Based on these 2016 insights, Ashfield commissioned a new, follow-up study to validate the learnings, compare and contrast HCP perceptions and dive deeper into the meeting landscape of today to see how it has

changed. This time we probed further, asking if HCPs still hold medical / scientific meetings as a primary source for their medical education, if they find it challenging to attend meetings, and how do they determine whether a meeting is likely to be worth the investment.

Our 2018 findings enabled us to understand what HCPs considered to be the optimum meeting duration, optimum amount of time away from the office and most challenging factors around attending scientific meetings.

Now that the number of digitally native HCPs outweighs the number of HCPs who did not come of age in the digital era, we explored whether alternative education channels were becoming increasingly more prominent in their learning journey. It is clear that HCPs want to expand their knowledge, connect with peers and discuss new advances in treatment. However, are they content with the current format(s) or are they seeking more inventive and innovative solutions?

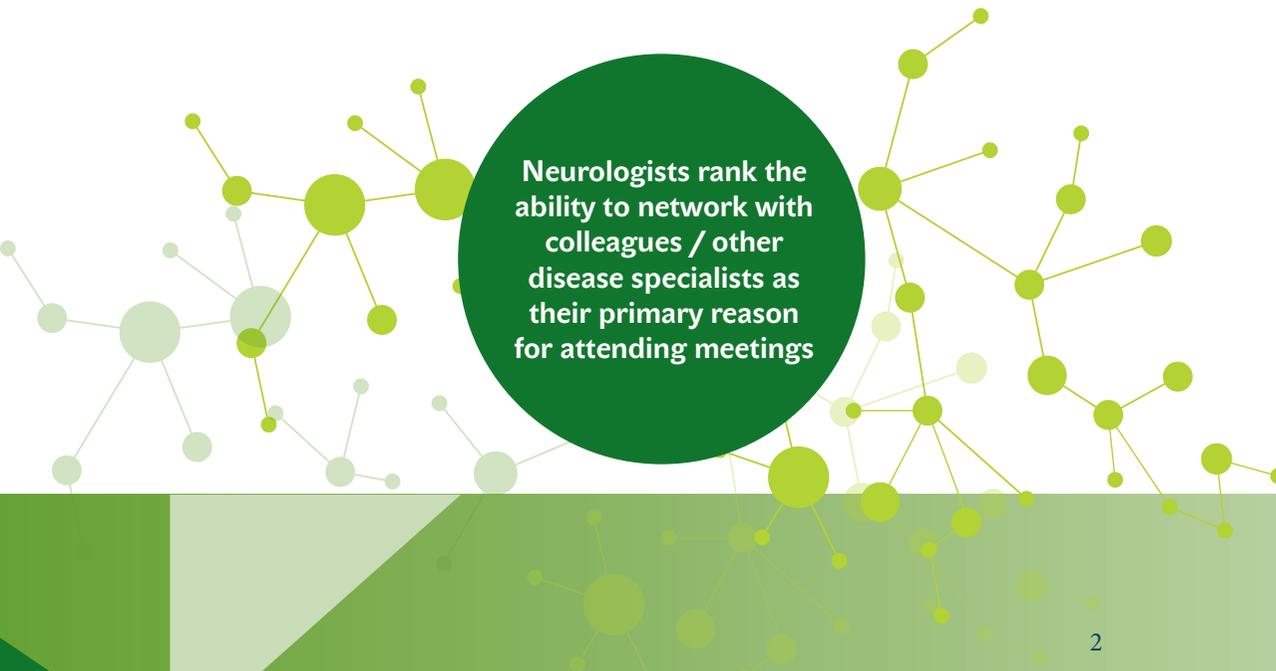


A key finding from our 2016 white paper was that HCPs find it increasingly difficult to attend meetings, whether because of more stringent regulatory codes or the inability to find time away from their practice.

It was evident that HCPs adopt a consumer-driven mindset toward meeting attendance, evaluating the merits of attendance against potential returns on investment and objectives. In a very short span of time, the significance of these consumer behaviours has become even more apparent, with 77% of HCPs now stating that they only attend meetings that offer a real return on the time and money invested – a 30% increase in just two years.



This paper explores and summarises new data and compares and contrasts this with the findings of the previous study. It continues to identify whether meetings and events are evolving to better meet HCP preferences, and it establishes whether barriers are being broken down by cultivating inventive solutions that support both medical education and professional development



Neurologists rank the ability to network with colleagues / other disease specialists as their primary reason for attending meetings

Executive Summary

Meetings continue to form a significant part of the HCP learning journey. The 2018 data has seen attendance at scientific congresses or meetings surpass professional journals and publications as the highest ranking preferred channel for obtaining medical education information. The increase, albeit marginal, shows that HCPs are still committed to attending live meetings, despite the growing number of alternative online and digital channels. Our research goes on to authenticate the 2016 data, qualifying that meeting attendance is the second most commonly used channel for sourcing medical education content.

The research in both studies found, in equal measure, the key motivators for attendance are the ability to network, to connect with peers and meet global / local experts and key opinion leaders (KOLs). This face-to-face interaction and engagement should be a key objective to those planning meetings, as 40% of HCPs now believe that they can harvest as much information from an online virtual meeting as from a live, face-to-face meeting.

The challenge we now face is to build programmes and agendas with open channels of communication that champion interactivity and dialogue throughout the lifecycle of a meeting. Today's meeting environments need to enable peer-to-peer interaction and accessibility to the experts, as these are primary drivers of physician attendance.

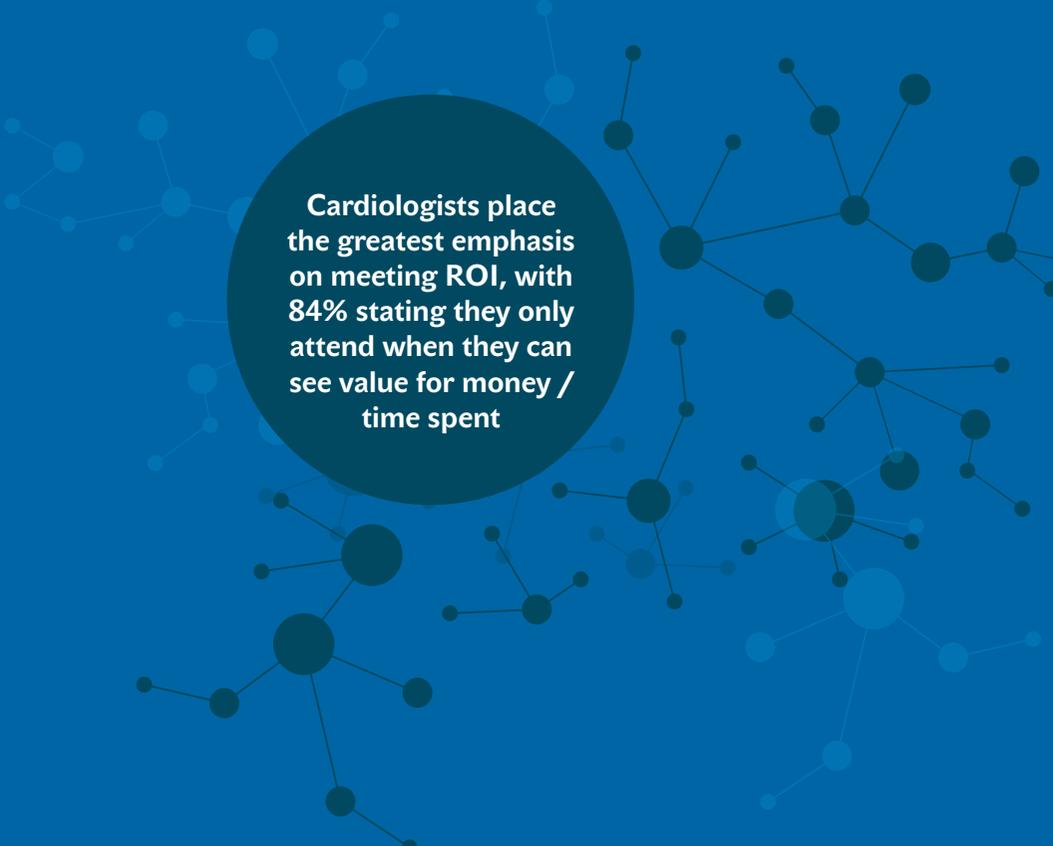
Given the ever-evolving digital landscape, the ease of access to a range of content via multiple channels and increasing barriers to attendance, a much greater emphasis must be placed on positioning HCPs at the heart of meeting objectives.



Through the survey data, physicians are telling healthcare companies, associations and meeting planners to provide inventive meetings programmes. Therefore, in order to maximise the meeting experience planners must devise unique event concepts, formats and learning environments that are powerful, effective and memorable.

The research we conducted captures HCP perceptions of face-to-face meetings. We assess in depth why HCPs continue to place this education channel above most others, as well as shedding light on how HCPs measure return on investment (ROI) from an individual consumer standpoint. Finally, we determined what HCPs believe meetings should deliver, the ideal format(s) they should follow and the educational value they should provide.

These insights will allow meeting organisers to shape event programmes and formats that support the development of HCP profiling, delivering event experiences that continue to draw strong attendance and surpass HCP expectations.



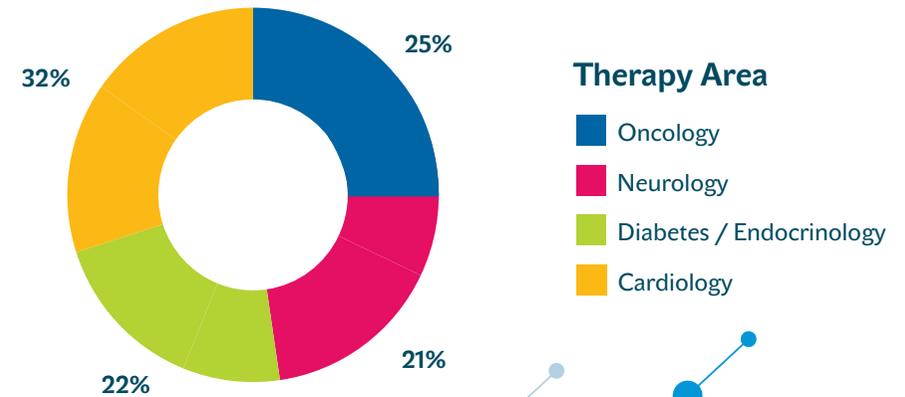
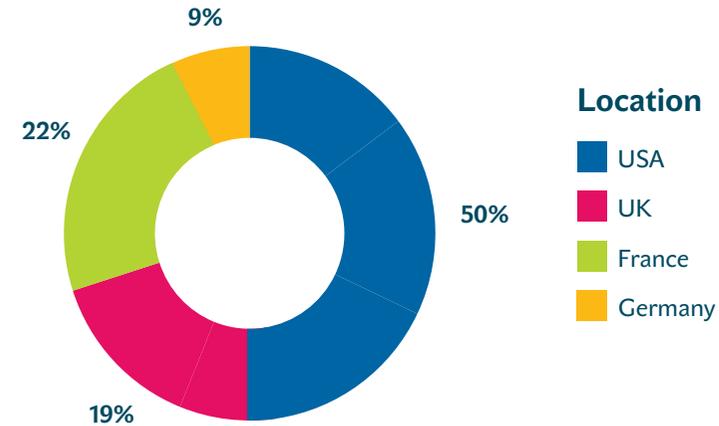
Cardiologists place the greatest emphasis on meeting ROI, with 84% stating they only attend when they can see value for money / time spent

Who did we speak to?

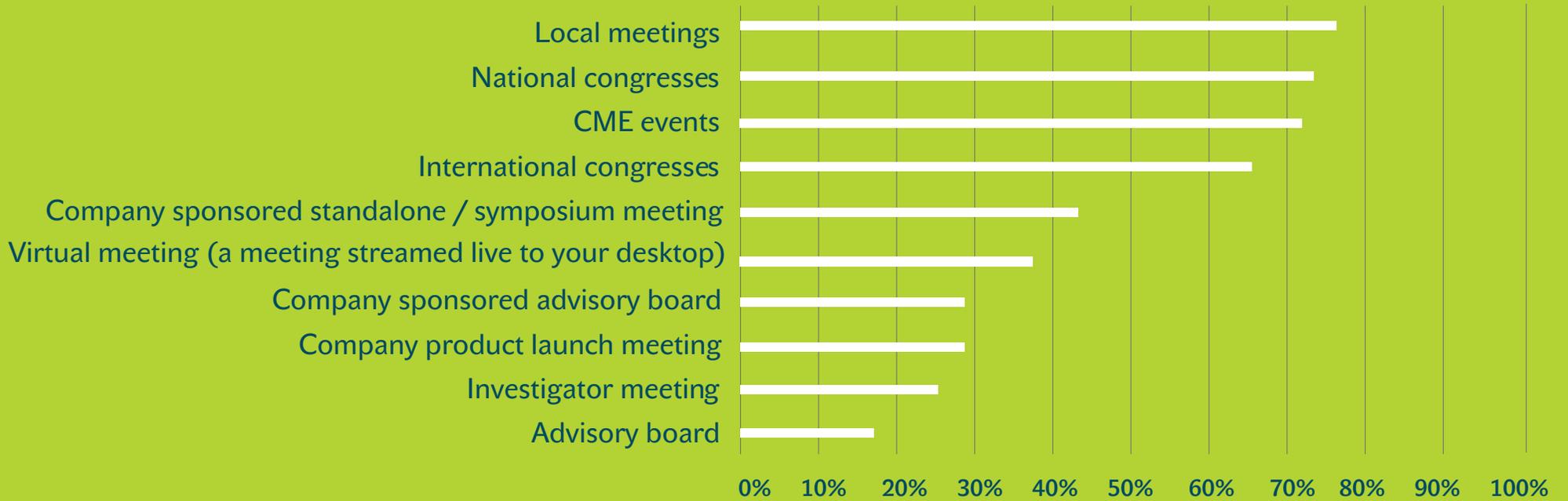
The Science Of HCP Meetings (2018) was a global study, created in collaboration with the Ashfield Insight's market research team. It incorporated 237 respondents conducted across four key markets, focused on four specialty areas.

Each respondent had attended at least one scientific meeting within the last 12 months. They had been qualified for an average of 16 years, mirroring the previous survey.

The respondent criteria enabled us to build complex and granular HCP profiles, allowing for meaningful compare-and-contrast analysis across geography and specialty, and isolating specific trends that generated HCP profiling data.



Meetings attended



Define a 'meeting'

For the purposes of this survey, we defined a medical / scientific meeting as follows: A gathering, symposium, seminar, conference, workshop, or any other organised, formal meeting to coordinate, exchange and disseminate information, exploring or clarifying a defined subject, problem or area of knowledge.

Note: the meetings attended by the respondents were not Ashfield-operated programmes.

Trends here to stay

Why HCPs attend meetings

Meeting attendance remains a key component of HCP education and development. Access to networking opportunities with global experts and KOLs is of importance to HCPs, with two-thirds of respondents listing this as a primary motivator for attendance.

The other prominent motivators for attending remain consistent with the 2016 data, with over 80% of HCPs citing the ability to learn the latest scientific content for their disease specialty and over 70% of HCPs citing the opportunity to hear about the latest products in development.



81%

of HCPs attend to find out the latest information from within their disease specialty



74%

of HCPs attend to network with colleagues or other specialists



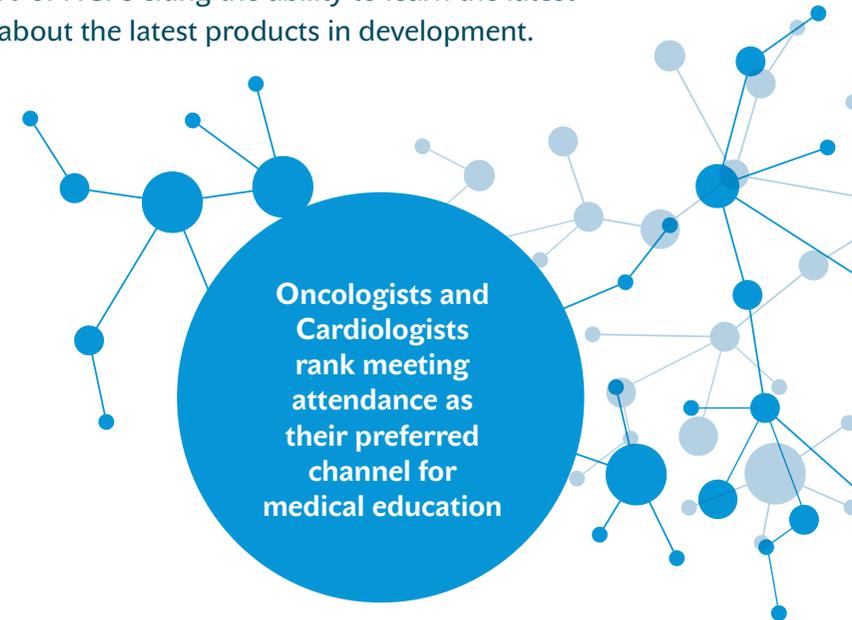
72%

of HCPs attend to hear about the latest products in their disease area



68%

of HCPs attend to meet with global experts or KOLs



The 2018 data showed a 9% increase in HCPs using meeting attendance as an opportunity to find time away from their practice. This was coupled with a slight increase (6%) in HCPs acknowledging the opportunity to visit a new city or location as a contributing factor in decision-making criteria. This lends itself to the notion that consumer behaviours are becoming more apparent. Destinations are clearly still a consideration as to whether or not a HCP is compelled to attend. The destination and appropriate venue selection remains important, despite the increasingly rigorous regulatory environment.

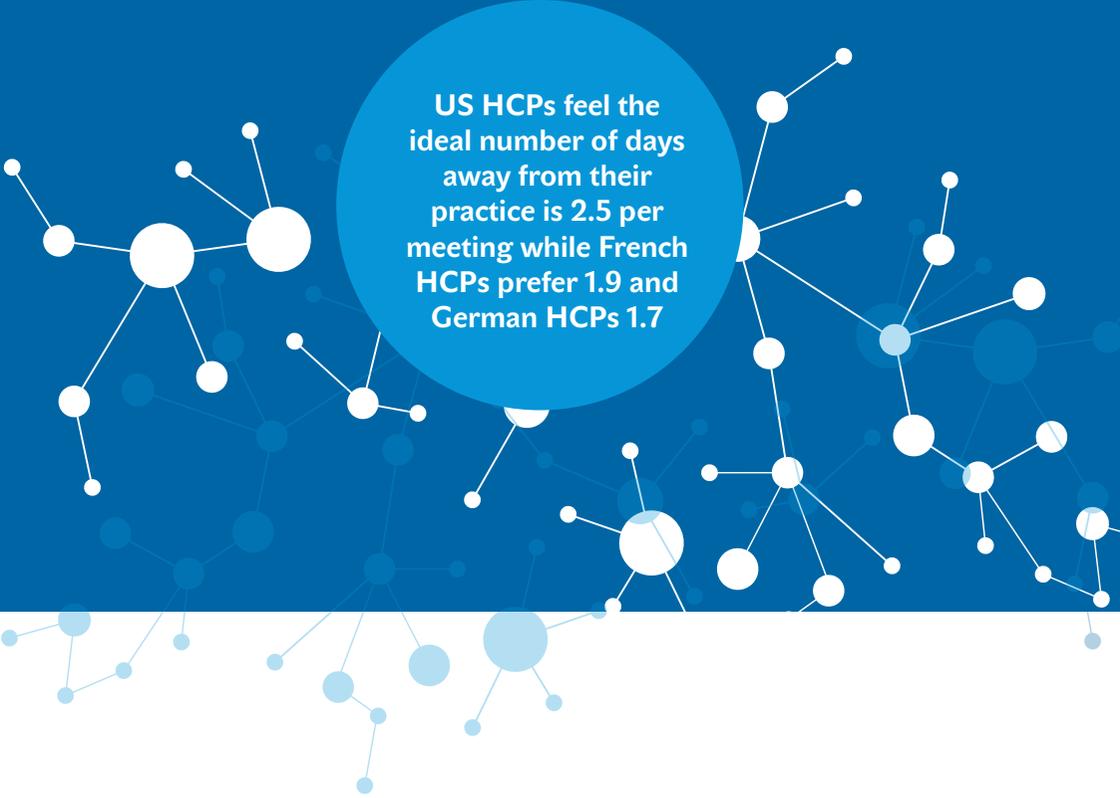
Barriers to attend meetings

Physicians are stating that meetings offer the optimum form of medical education, ranking it the preferred channel in 2018. However, medical meetings rank second as the most commonly used channel, which, by inference, suggests that despite that preference, there are factors that limit opportunities to attend and participate.

54% of HCPs identified that increasing regulatory barriers continue to restrict their ability to attend face-to-face meetings – similar to the previous study's 53% figure.

The similarity in data from the two studies suggests that regulatory barriers are a continued concern across a high percentage of HCPs. However, given that financial interactions have been in the public domain for over two years now in Europe - longer in the US - the marginal increase could imply that disclosure is not causing additional concern or challenges. It also could be interpreted that any associated impact on medical meeting attendance has plateaued.

Further analysis of the 2018 data suggested that the industry was rationalising its support for attendance at meetings, as 41% of HCPs were experiencing limitations on the number of sponsorship opportunities available from pharmaceutical companies. Despite this, over a quarter of physicians have to apply to companies for sponsorship. This suggested that healthcare companies were also evaluating ROI and adopting a cautious approach, potentially as a direct result of transfer of value disclosure.



US HCPs feel the ideal number of days away from their practice is 2.5 per meeting while French HCPs prefer 1.9 and German HCPs 1.7

Meeting preferences

Over 74% of HCPs in the 2018 survey stated that time away from their practice and difficulties managing workload remained the most challenging barriers to attending events. In the 2018 survey, HCPs considered the ideal meeting length as a little over two days, which was similar to the 2016 survey.

HCPs do not want to spend more than 3.2 days per meeting away from their practice in total, including travel time – a decrease from the 3.6 days recorded in 2016. In relation to travel time to meetings, the 2018 data found that HCPs were only willing to spend 4.7 hours traveling to a meeting, which is a significant change from the 2016 figure of 6.8 hours.

What can be deduced from this is that HCPs are time restricted and looking for maximum impact, with minimum time spent. The amount of time that HCPs prefer to spend at a meeting has remained comparable, but acceptable travel time and time away from the office are significantly decreasing. The reduction in time spent travelling may well point towards an industry need to make meetings more accessible in the form of localised, regional meetings.

Our data offers clear evidence that HCPs still place significant value in the experience of a face-to-face meeting, yet are being forced to be more selective in the meetings they attend to ensure they feel they achieve a worthwhile return on investment.



Creating engaging educational experiences for HCPs

Across both data-sets, we have established that there are multiple factors that could influence a HCP to attend a meeting. When these factors are measured against a wealth of alternative educational channels, it is evident that programme content, format and educational value really must deliver on HCP expectations.

The 2018 survey indicated that more than one in four HCPs walk away from an event with a negative impression. Based on the number of HCPs who still have reported negative experiences, there is clearly work to be done. Understanding what HCPs desire from attendance at scientific meetings will greatly impact the industry's ability to deliver an effective meeting experience – one that is memorable, impactful and encourages repeat attendance and continued engagement.

The Science of HCP Meetings data uncovers what HCPs want. However, to create a richer educational experience, associations, pharma companies and meeting planners need to recognise that physicians have individual learning preferences. The need to tailor content, develop unique experiences and pinpoint specific goals relevant to HCPs is becoming a necessary industry responsibility.

Over 78% of HCPs would value this personalised meeting experience, tailored both to their areas of interest and the ways they like to learn. Understanding a HCP's culture, geography, specialty or specific areas of interest will foster a personalised learning experience that will engage them and deliver on their objectives.



More interactive learning

Our 2018 research outlines key considerations that have the potential to support the HCP learning journey and enhance participation at meetings.

There are numerous strategies that can be adopted to turn an event from a conventional PowerPoint-heavy meeting to an engaging, impactful learning session. The insights demonstrate that through increased engagement and interaction, the objectives for medical meetings can be best achieved.

A snapshot of what HCPs want to see at meetings:



More workshops and interactive sessions

76% of HCPs believe this would increase the educational value of a meeting



More discussion and debate opportunities

45% of HCPs believe meetings lack enough of these interactive elements

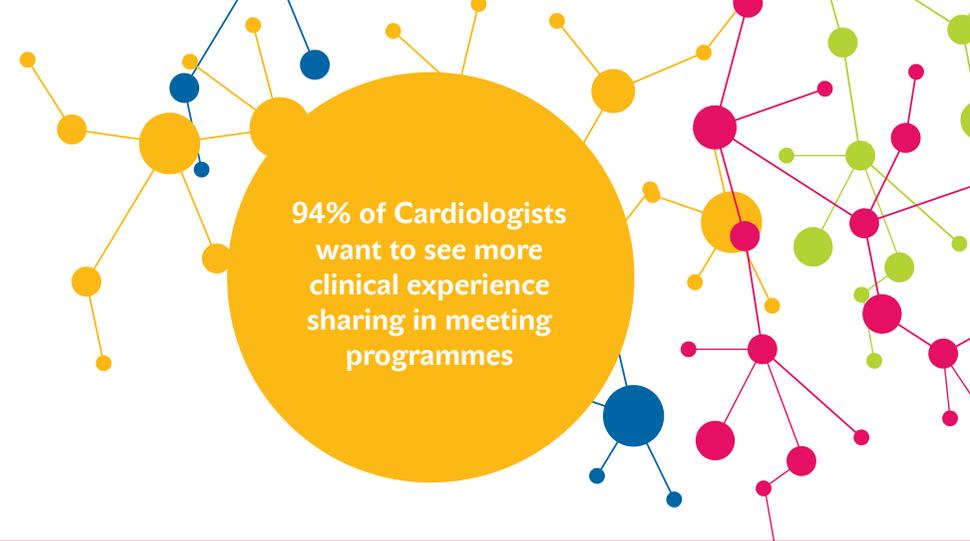


More access to meeting content

72% of HCPs expect materials to be available via a meeting portal / website, with 54% of HCPs failing to find access to content or presentations

More dynamic content

When asked what a good meeting looks like, a significant number of HCPs stated that meetings should be a mixture of physical and virtual. Specialist speakers are regarded as high priority, along with the programme format. Meetings should be comprised of short, impactful sessions and – unequivocally – of high quality scientific content.



91%

said meetings should have high quality scientific content



85%

of HCPs said meetings should be short, impactful sessions



85%

of HCPs said meetings should be full of specialist speakers



78%

of HCPs said meetings should be a mixture of physical and virtual



74%

of HCPs said meetings should have greater interaction between participants and KOLs

Physicians firmly believe that meetings should apportion a larger share of the agenda to clinical experience sharing, allowing for higher levels of interaction between the audience and the KOLs.

HCPs also want to digest content through a variety of formats while on site. Over half of those surveyed would like to see less time spent on non-educational activities, providing the opportunity to replace this time with interactive, networking engagements.

Content drives experiences

The research offers strong evidence to suggest that the HCP expectations are being met in part and that meeting planners and business stakeholders are evolving their meeting programmes to accommodate educational needs.

More often than not (66%), HCPs are of the opinion that they leave a meeting feeling better informed. HCPs stated that 59% of meetings they had attended had provided meaningful discussion with KOLs and informative Q&A. Well-prepared speakers were regularly experienced by 68% of HCPs.

However, nearly 45% of HCPs told us that meetings often have insufficient content to satisfy their educational needs. A quarter of respondents found that, most often, content was repetitive with no new topics offered. A contributing factor to the dissatisfaction in levels of content could be that 20% of HCPs regularly experience a commercial bias with a further 65% of surveyed HCPs experiencing commercial bias in content occasionally.



86%

of HCPs said meetings should have more clinical experience sharing



84%

of HCPs said meetings should have a variety of forms of presentation and communication



57%

of HCPs said meetings should have less time spent on non-educational activities



82%

of HCPs said meetings should provide active panel discussion between speakers and participants



80%

of HCPs said meetings should provide more interactive activities, sessions and content



70%

of HCPs believe meetings have a lack of patient representation



62%

of HCPs said meetings should provide the ability for delegates to contribute to the meeting agenda



57%

of HCPs said meetings should provide more on-site data collection for immediate analysis

Expanding the impact of content

Content is king - that much is abundantly clear. However, it is the responsibility of event stakeholders and agencies to provide content that is engaging, interactive and delivered with impact by specialist speakers. Well-prepared and informed speakers who embrace alternative delivery techniques will engage an audience and create a memorable experience for attendees.

Access to content online has almost become a mandatory requirement for meetings. However, content needs to be balanced against a shift in demand for discussion, interactivity and the adoption of virtual or hybrid meetings.

Careful consideration will need to be given as to how programmes and content are curated and what will seamlessly translate from physical event space to online or on-demand content. Patient case studies and patient representation are focus areas for HCPs who are seeking the opportunity to discuss these topics and scenarios with experts and specialist speakers.



88%

of HCPs said meetings should provide access to presentations and supporting documentation



87%

of HCPs said meetings should provide access to content online



79%

of HCPs said meetings should provide patient case study discussion

HCPs told us that innovation and challenging conventional event formats would be well-received. Meeting stakeholders should be driving an 'innovation through collaboration' approach that involves sourcing strong partnerships to deliver HCP programmes. This will ensure that healthcare meetings remain a prominent part of the HCP educational matrix.

Application navigation

The need to develop online solutions and virtual event content is echoed by sentiments that were made during the initial survey. In fact, 70% of HCPs would like a single platform to serve as a communication channel, registration site and environment to source information regarding an event – and an accessible website consistently ranks as the preferred way to access post-event meeting material.

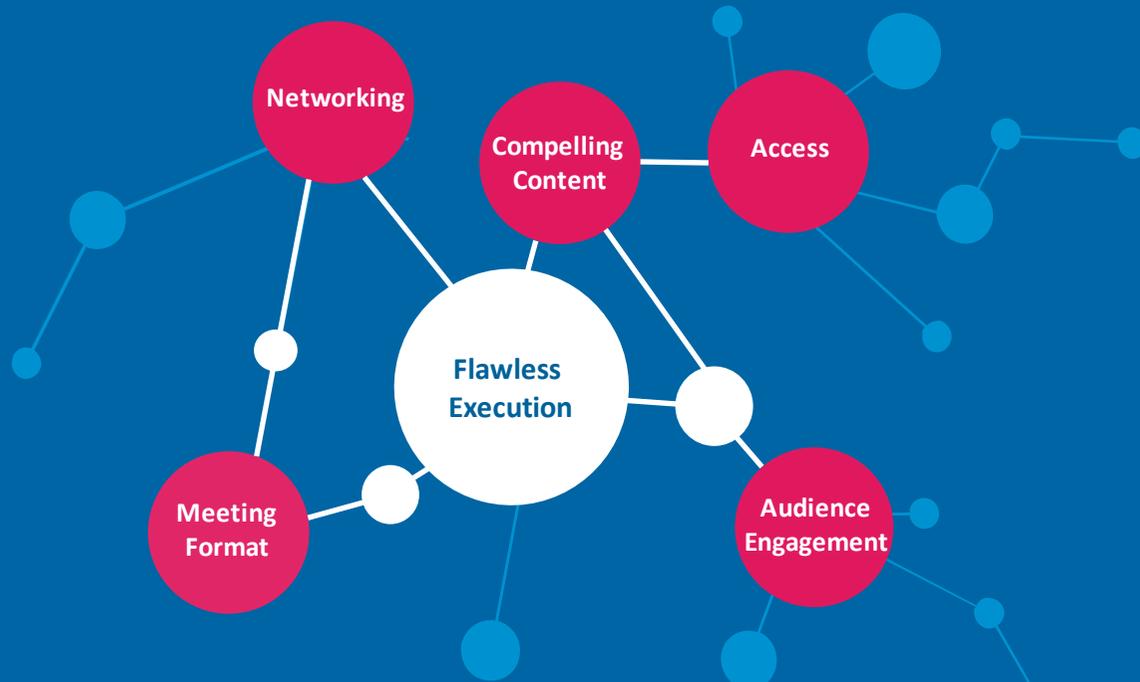
The 2018 survey expanded this question to ask specifically why this platform would be beneficial. The most heavily weighted response was to have visibility of the meeting agenda and speaker biographies, once again inferring that consumer behaviours are prevalent in decision-making – HCPs wanted to assess the educational returns before committing to attending.

The ability to submit questions to KOLs and speakers also ranked highly, which complemented the responses in relation to programme input. 38% of HCPs said they were never asked for input into a meeting's agenda, while 80% actually wanted some form of involvement. Programme involvement can take various forms - from pre-event surveying of attendee objectives, inviting the submission of pre-determined questions and topics of interest - through to onsite Q&A and interactivity, allowing HCPs to positively contribute to the outcome of a meeting.



The strategy for successful HCP meetings

HCPs' preferences on educational meetings are clear. Physicians want greater interaction and connection with experts, greater accessibility to content, and more return on their investment. By maximising face-to-face experiences and using multichannel communication tools to deliver the right high quality content, the pharma industry can make sure they – and the HCPs who attend – derive more valuable outcomes from every meeting.



Summary of key findings

The insights gathered as part of these two studies offer substantiated evidence that meeting attendance remains a key educational channel for HCPs. This has become increasingly evident as our 2018 data now classifies meeting attendance as the highest ranking preferred channel for obtaining educational content. The significance of face-to-face interaction and engagement should not be undervalued. However, with societal changes and the rise of the digitally native, the need and ability to future-proof event programmes is becoming ever more critical.

Meetings should form part of a broader strategy and range of activities that delivers a multi-channel educational solution, making content highly accessible, driving interaction, enabling engagement and delivering a richer educational experience.

When you digest the data and consume the narrative, there is a simple story being told. HCPs want to attend meetings. The educational benefit clearly still outweighs the numerous challenges routinely encountered by HCPs, and meetings still represent a fundamental component in their learning journey.

But what is also abundantly clear, is that while HCPs want time away from the office to invest in their education, that time is limited. This forces them to adopt a typical consumer mindset when assessing a meeting's value and potential ROI.

Over a two-year period, we have seen a significant increase in this emphasis on ROI, challenging stakeholders to work harder and make sure meetings offer even more to prospective delegates.

The evolution of the scientific meetings landscape offers numerous challenges to pharma companies, associations and meeting planners, but it also brings about an exciting era of opportunity. A shift in how meetings are facilitated, managed and delivered will furnish commercial and educational returns. Sourcing a network of experts and driving an 'innovation through collaboration' approach will deliver gold-standard meetings and events programmes. Physical meeting attendance will become part of a multi-layered experience, embracing a variety of learning styles to ensure that events continue to form an integral part of a physician's medical education journey.

The Ashfield 'Science of Meetings' approach to HCP interaction, engagement and meeting management offers solutions to these challenges. It also creates opportunities to connect with experts from across Ashfield's Insight, Healthcare Communications and Meetings & Events teams. Our ability to provide insight-led, personalised HCP experiences that deliver maximum engagement and impact is a unique proposition – delivering powerful, multi-channel events to influential healthcare professionals.



About the study

Ashfield commissioned this research as a follow-up study to the 2016 white paper, *The Future of Meetings*. The objective was to validate our learnings, expand our understanding of HCP perceptions and dive deeper into the current meetings landscape.

The anonymised, double-blind online survey which forms the basis of this white paper was commissioned by Ashfield Insights' market research team in October 2017 across four key geographical markets, with 237 specialists representing four specialty areas. Respondents to the survey had all attended at least one scientific meeting within the last 12 months. The questionnaire was designed to capture the broader meeting experience, it was not feedback on Ashfield operated programmes.

HCPs were asked a series of questions relating to their meeting attendance over the last 12 months and the criteria they used to evaluate them. They were also asked some broader questions about the role of meetings in their overall learning journey.

About Ashfield Meetings & Events

Ashfield Meetings & Events, part of UDG Healthcare plc, is a full-service meetings management company with a sole focus on serving the healthcare and life sciences sector.

Ashfield can provide access to industry-leading insights, solidified by years of success as a strategic partner to the world's leading pharmaceutical companies. In addition to delivering exemplary meeting logistics, Ashfield also offers creative, production, exhibits, venue sourcing, SMMP and meetings compliance solutions for clients throughout the product lifecycle.

The Science of HCP Meetings methodology delivers more engaging face-to-face and multichannel experiences at medical meetings. If you would like to put it to the test, and maximize the value of your meetings, please get in touch.

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