

# The Future of Meetings

Understanding physician perspectives on scientific meetings, how meetings are changing, and future challenges for pharma companies



A white paper based on data collected by Ashfield  
February 2016

*"...the future of meetings  
is more HCP-centric,  
nuanced and successful  
in delivering real value  
and greater impact..."*

# The changing face of physician needs

## Welcome to the future of meetings

As part of their overall learning journey, healthcare professionals (HCPs) attend 'scientific meetings' to expand their knowledge, connect with peers, listen to thought leaders and discuss new advances in treatment.

Surveys consistently reveal that scientific meetings feature in the top three preferred channels for HCP medical education. But will that always be the case?

With changes in legislation and shifts in technology that facilitate remote learning, will HCPs continue to travel halfway around the globe for a scientific meeting, ad board or standalone, taking days away from their practice?

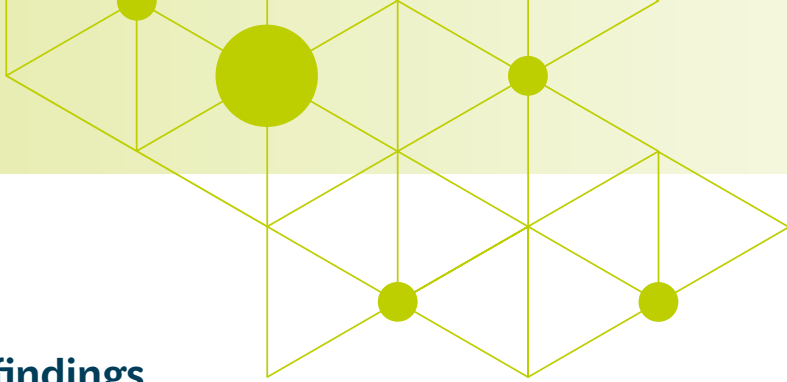
Or will they become increasingly selective, looking for alternative medical education channels and only attending in person those meetings known to deliver a return on their investment of time and money?

These questions point to trends which look set to continue for the foreseeable future.

Our aim has been to find out what drives HCPs to attend scientific meetings, what criteria they use in evaluating them, and how they see the scientific meetings of the future evolving.

This paper summarizes that research and builds in some reflection points for those seeking to engage with HCPs effectively in meetings and in their preferred way.





# Executive summary

Meetings are critical to a HCP's overall learning journey. The research reveals HCPs' main motivations for attending scientific meetings are around connecting with peers, idea exchange and hearing the latest developments in their field delivered by global thought leaders.

However, nearly 40 per cent of those interviewed have not had a positive delegate experience at the meetings they have attended. This is not an insignificant number and the research addresses ways in which experiences can be improved.

The research also investigates the barriers to attendance and other logistical challenges HCPs face, including changes in legislation (eg EFPIA Code/ Open Payments in the USA) and managing workloads when away from their practice. As constraints upon HCPs grow, the impact and value of an event must grow accordingly, to warrant their attendance.

The research reminds us: HCPs are consumers and will respond in a similar way to experiences that are well thought-out, designed and delivered, take into account their motivations and make an emotional connection.

*"HCPs have a clear-eyed experience of the world beyond their professional field. In other sectors, where they interact as participants or consumers, they see developments towards customer-centricity"*

## More key findings

Other findings include the expectations HCPs have around shaping event agendas, technology platforms, distances travelled and time expended on meetings. The first finding is particularly interesting, with 75% of those surveyed keen to have greater input.

The research indicates that delegates' ideal meeting length is around 2 days, with just a day of travel in total (ie half-a-day either side of the meeting) - meaning that overall they prefer to be away from their practice for no more than 3 days.

They see developments towards customer-centricity, which harness technology to provide seamless experiences across touchpoints, as being the way forward for meetings.

## Related issues

The Future of Healthcare Meetings forum held subsequent to the primary research has added an extra perspective to the data shown in this document. Key topics include the following:

- *Internal collaboration*  
Greater alignment of goals between marketing and medical affairs will assist in delivering seamless delegate experiences
- *Patient empowerment*  
HCPs are conscious of the greater information at patients' disposal and welcome the idea of patients having a voice at meetings they attend
- *Meeting length*  
The trend is towards shorter meetings, with HCPs preferring a length of 2 days, including travel

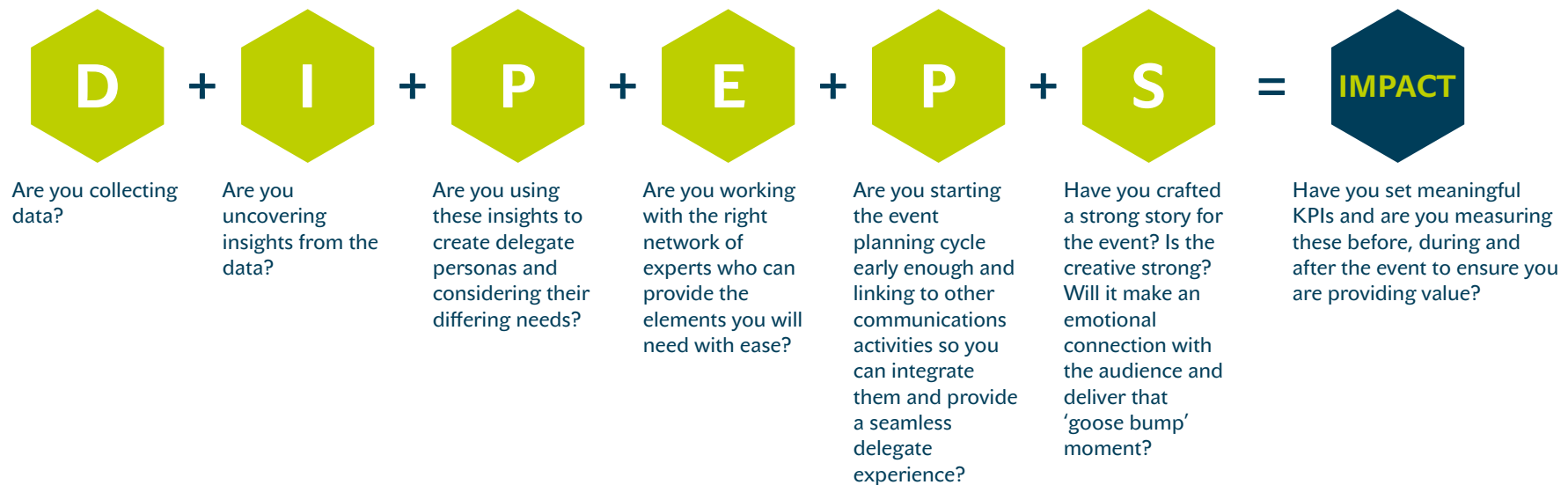
## Towards a holistic solution

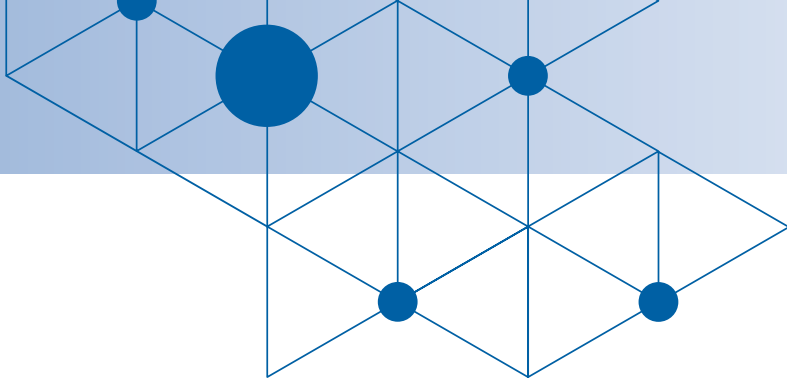
Thinking of the overall delegate experience, real impact can be delivered by seamlessly connecting all touchpoints, pre-, peri- and post-event. Looking to the future, the overwhelming view from the research is that meetings in 10 years will be increasingly virtual and interactive.

So what can pharma start doing right now to improve the meetings experience? The following methodology incorporates all the findings into a workable formula:

For meetings to continue to add value for HCPs and pharma alike, new approaches are needed: ones which leverage technology, construct seamless experiences, and provide opportunities to contribute and create emotional impact.

Data + insight + personalization + experts + planning + storytelling = **impact**





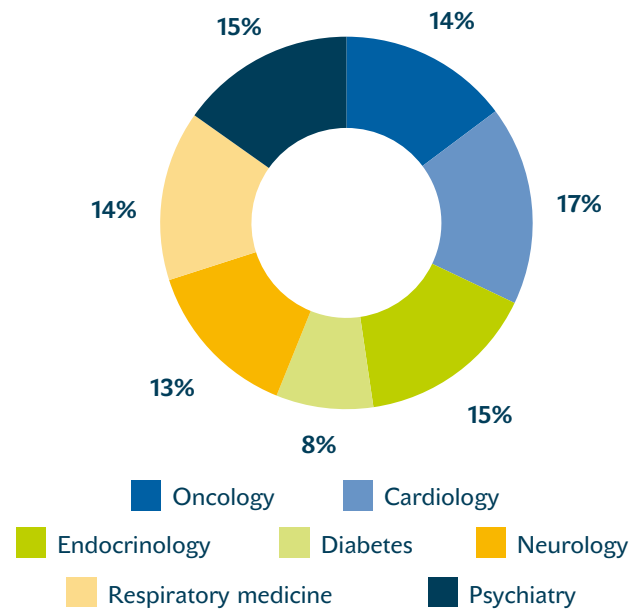
# Who did we speak to?

This is a global study with interviews conducted in 11 countries across the Americas, Asia and Europe. The respondents represent a broad range of HCP specialties and a spread of experience.

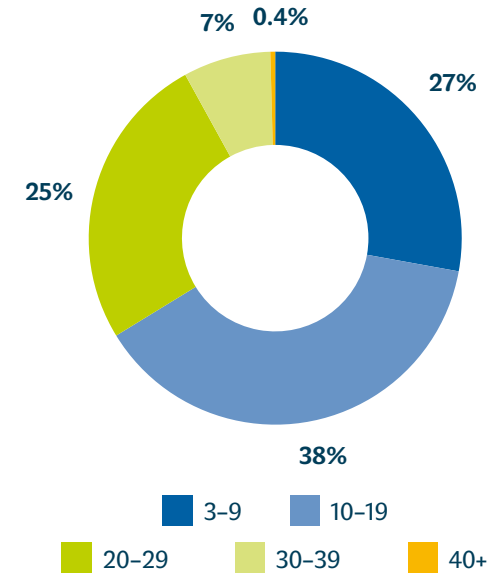
To be selected for interview, every HCP had attended at least one scientific meeting within the last 12 months.

Country	%
USA	12.66
UK	8.44
France	8.86
Germany	8.44
Italy	8.44
Spain	8.44
Russia	8.44
Turkey	8.44
China	9.28
Brazil	10.13
Argentina	8.44

HCP specialty

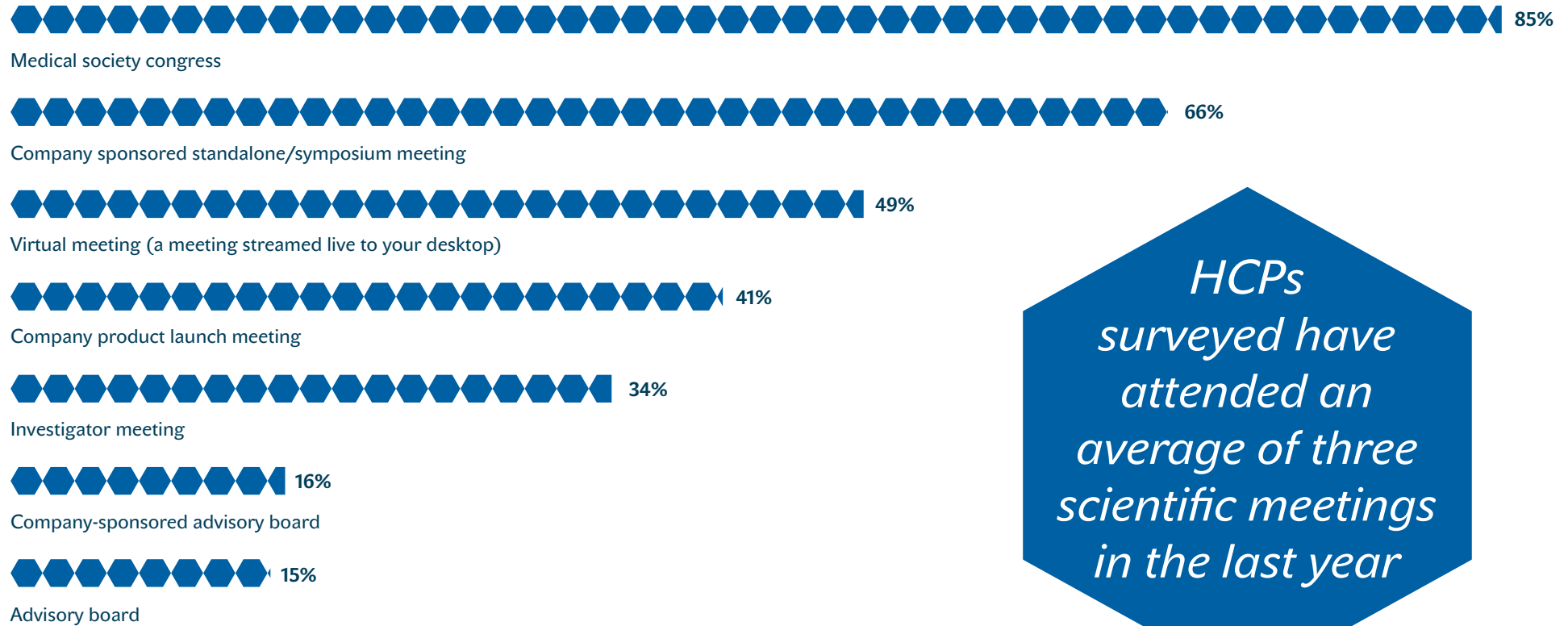


Number of years qualified



*HCPs we consulted have, on average, been qualified for 16 years*

## Type of meetings attended over the last 12 months



*HCPs surveyed have attended an average of three scientific meetings in the last year*

## Define a 'meeting'

For the purposes of this survey we define a scientific meeting as follows:

A gathering, symposium, seminar, conference, workshop, or any other organized, formal meeting to coordinate, exchange, and disseminate information or to explore or clarify a defined subject, problem, or area of knowledge.

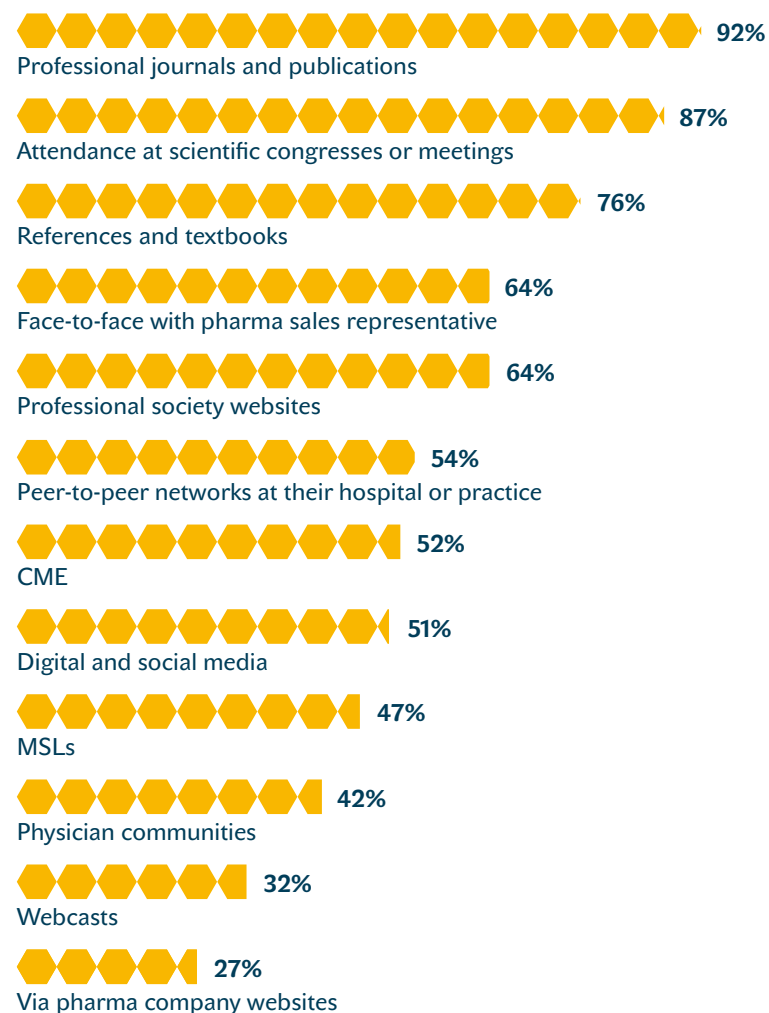
# The role of meetings in the HCP's overall learning journey

Scientific meetings are just one of the many touchpoints HCPs use to meet their education needs. When asked which channels play a regular role in their learning journey, scientific meetings were the second most popular (87%) after professional journals (92%).

Professional journals and publications	2.63	
Attendance at scientific congress or meeting	2.65	
CME	3.75	
References and textbooks	3.81	
Professional society website	4.42	
Peer-to-peer networks at hospital/practice	4.80	

When then asked about their preferred channels the order changed slightly. Preferences were ranked by respondents on a scale of one to 10, with one being 'strongly preferred'.

As the data shows, meetings are one of the most important and highly valued elements of the HCP learning journey. The next steps in the research were to better understand why meetings play the role that they do for HCPs, the challenges and needs of HCPs when it comes to preparing for and attending meetings; and the criteria they use to judge the impact of meetings they attend.





# Why meetings are important for HCPs

When HCPs were asked about their motivations for attending meetings, and how meetings help them to fulfill the needs of their overall learning journey, the responses clustered around several main topics.

The top five motivations for attending meetings were cited by HCPs as follows:

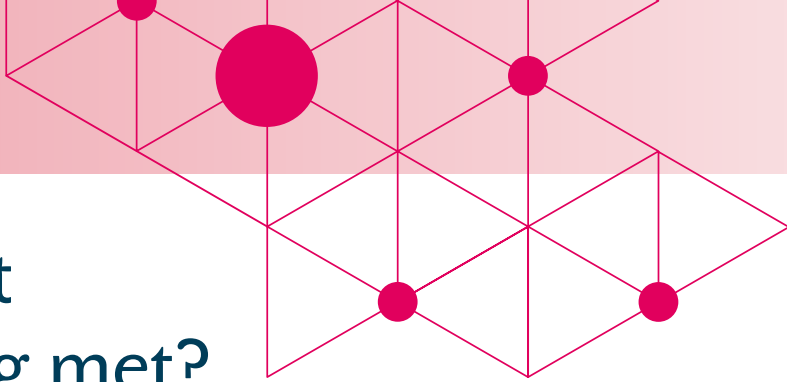
- 1 finding out about the latest scientific content for my disease area – 85%
- 2 meeting with global or local experts or KOLs – 76%
- 3 hearing about the latest products in development for my disease area – 74%
- 4 networking with colleagues/other disease specialists – 72%
- 5 having exposure to a wide range of content – 54%.

This data provides us with our first significant reflection point: are meeting providers actively and adequately engaged with these HCP needs?

Furthermore, are those managers in pharma who are responsible for delivering meetings, deploying the kind of metrics required to evaluate event outcomes and ensuring that meeting programs and HCP impact are aligned?

*"I use meetings to gather ideas and identify weaknesses in my knowledge"*  
Oncologist, USA

*"Attending scientific meetings enables me to learn of the latest domestic and international developments in medical science"*  
Psychiatrist, China



# Meetings are important to HCPs, but how well are their expectations being met?

The data demonstrates that an overwhelming majority of HCPs, 95%, expect the meetings they attend to be engaging and impactful. While 83% expect post-meeting materials to be available via a meeting portal website. Yet a large proportion of respondents report negative experiences of meetings.

These numbers are very revealing; the difference between expectation and satisfaction represents a major disconnect between HCPs and meeting providers. There is clearly more that the industry can do to meet HCP expectations, especially when it comes to giving them the ability to input into program agendas.

Another major set of challenges exists for HCPs around physically attending meetings. Some 53% stated that industry codes of practice are increasingly restricting their ability to attend meetings. While 61% find it difficult to attend meetings and would like information to be available online and in real time, so that they can access it remotely, around their practice commitments.

If you are involved in delivering meetings, are you taking into account the logistical burden they place upon HCPs?

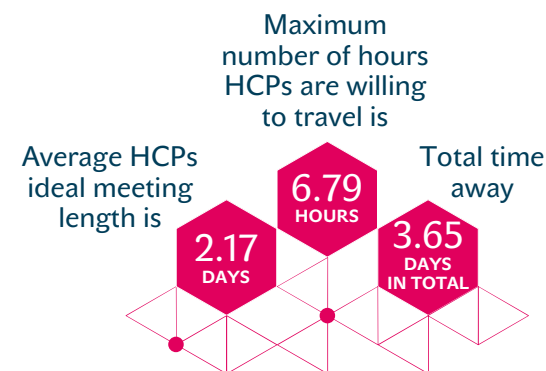
*39% of HCPs stated that they have not had a positive delegate experience at many of the meetings they have attended*

*88% said that meeting organizers should offer a seamless delegate service across registration, travel, accommodation and post-meeting materials*

*36% of HCPs have never been asked to provide input into the agenda or program*

# So, how can pharma help HCPs overcome their challenges?

In the data HCPs reveal how their challenges can be addressed. In addition to issues around regulation and time away from practice, HCPs report a variety of other factors which prevent them from attending meetings. Workload, cost and logistics lead the way; with the tasks of finding and compiling materials and registering also noted.



*75% of HCPs would like to have greater input into the agenda*

*70% of HCPs stated they would like a single communications platform where they can register for an event and access all ongoing communications relating to a meeting*

*"It should be as simple as possible for participants"*  
**Endocrinologist, Germany**

So how can pharma help? The research highlights key issues the industry can address:

- taking into account the distance HCPs are willing to travel when choosing meeting locations
- creating the seamless experiences HCPs expect
- engaging HCPs by enabling them to shape meeting agendas is vital
- leveraging digital technology to support new, more flexible modes of event delivery.

The future of meetings is clearly more HCP-centric and tailored to the needs of participants, both in terms of their learning journey and their growing logistical constraints.

This is another suitable point for reflection: to what extent is the delivery of an event based upon a holistic approach that encompasses pre-, peri- and post-event considerations?

# What criteria do HCPs use to evaluate meetings?

The data shows what HCPs expect from meetings, and some of the challenges they have in attending. To further understand HCP perspectives, we asked about the criteria they use to evaluate their experiences.

A range of themes emerged, including the expertise and independence of the speakers and the clarity of presentations; the range and depth of topics and their practical application; and, the balance of time spent versus knowledge gained. Good data from quality studies, and quality exhibitors, are also valued.

Engaging with these criteria will put meetings organizers in an even stronger position to deliver impactful events.

So, how can we increase engagement pre- and peri-meetings? We know that HCPs actively use a range of digital devices during meetings, and the means to interact via smartphone or tablet is rated 'extremely valuable' by a majority.

There is a similar story in relation to follow-up, where the top three post-meeting formats are:

- website displaying meeting materials online
- electronic content/files received by email from meetings organizers
- memory sticks.

*"I evaluate whether the event topic is related to my daily clinical practice"*  
Oncologist, Italy

✓ POSITIVE impressions	NEGATIVE impressions ✗
Having a good speaker, who is engaging and highly respected within the industry	Poor quality content   Bad Speakers
The ability to speak to KOLs and having Q&A sessions   The ability to talk to colleagues and exchange ideas	Not seen as having enough qualifications (speakers)
When the content is available online	Presentations/ boring PowerPoints   Biased, obvious they are selling a particular product
Good organization of an event   Good content and sessions	Not giving new information, repetitive topics
<b>Good presentations</b>	Too difficult to break down, hard to understand key points
Easy access to meeting materials	Disorganized   Delayed travel
	Disruptions to agendas and poor timekeeping

# What do HCPs think meetings will look like in 10 years' time?

To conclude the research, HCPs were invited to scan the horizon. Even as the industry strives to deliver impactful HCP meetings today, it is vital to look ahead too. By understanding the ways in which HCPs envisage the future of meetings, we are better equipped to meet their evolving needs. Technology is at the heart of their changing perceptions.

*"Unrestricted,  
online, accessed  
from home..."*  
Oncologist, Spain

*"...pre-meeting  
discussion forums with  
electronic resources to  
broaden the interface  
with participating  
members..."*

Psychiatrist, Brazil

*"a mixture of  
augmented reality,  
interactive software  
and hardware, virtual  
attendance and increasing  
use of social media"*

Dermatologist, UK

The overwhelming view from HCPs is that meetings in 10 years' time will be largely virtual and interactive, with built-in modules to check learning. Much of the technology already exists to deliver this vision.

The task of compiling meeting materials and the need to use multiple sources for information can be largely eliminated by well-crafted digital event platforms; discussion forums can facilitate networking online; live streaming of presentations minimizes arduous travel requirements.

There is scope to go further. Decentralize and distribute entire events, with portions of the agenda in different places and at different times. Or move parts of the agenda around so they take place in a series of locations successively.

The conclusion of the research is clear: the future of meetings is being driven by digital technology that provides a presentational flexibility which is limited only by imagination, to deliver ever-more impactful events centered on a clear understanding of HCP needs.

# About this study

The online survey which forms the basis of this white paper was commissioned by Ashfield and conducted in July 2015 across 11 markets with 237 specialists representing seven therapy areas. Respondents to the survey must have attended a scientific meeting within the last 12 months.

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

## Ashfield Commercial & Medical Services

Ashfield Commercial & Medical Services, part of UDG Healthcare plc, is a global leader in the provision of outsourcing services to pharmaceutical manufacturers, with operations in major markets including North America, continental Europe, the UK and a presence in South America and Asia.

Ashfield provides sales teams, telesales, nurse educators, medical information, healthcare communications, market research, marketing consultancy, and training and event management services to healthcare companies in 20 countries. It focuses on supporting HCPs and patients at all stages of the product life cycle.

## Science of Meetings

Science of Meetings is a formula developed by Ashfield and is a seamless collaboration between the Ashfield Healthcare Communications, Ashfield Meetings & Events and Ashfield Insight & Performance teams. The Science of Meetings approach provides Ashfield clients with access to the very latest thinking, methodology and network of experts to deliver insight-led, personalized HCP experiences that deliver maximum engagement and impact.

Underpinning the Science of Meetings approach is the strategic meeting planner who connects the right experts from across the business, ensures they are aligned around the event goals and provides a seamless client interface. It is an attractive approach for clients who are looking to provide an impactful seamless experience to their delegates. Contact us to see how we can help make your events deliver more impact.

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