



# The Future of Healthcare Exhibiting is Learning 2014

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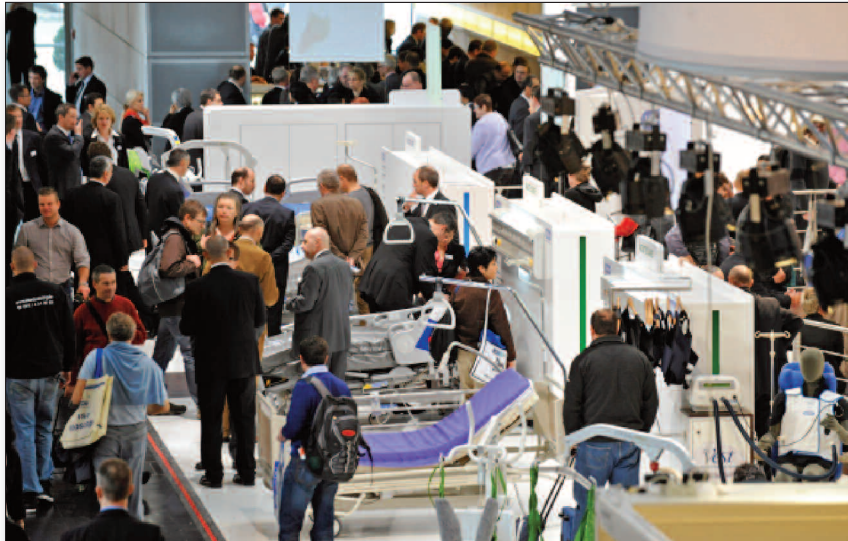
An Exclusive Industry Analysis by marketech360

# OVERVIEW & APPROACH

The key to the future of healthcare exhibiting is LEARNING. As healthcare exhibition marketers, we must continually find ways to provide an experience on the convention floor that offers healthcare professionals the opportunity to LEARN in ways that are consistent with their learning styles, continuing medical education, and combine the experience of the exhibit with increased learning and understanding.

“The Future of Healthcare Exhibiting is LEARNING - 2014” is the fourth in a series of white papers produced by marketech360 to help healthcare exhibitors understand current trends in our industry segment to maximize the return on their face-to-face marketing investments.

Our three prior white papers – “Why Physicians Come to Your Exhibit,” “Dynamics of Healthcare Marketing for Healthcare Professionals,” and “The Future of Healthcare Exhibiting,” were published in 2005, 2008, and 2011, respectively. Where feasible, comparisons are made to these prior studies. This latest paper is the result of data collected from events in 2012-2014.



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At the cornerstone of this analysis are cumulative quantitative findings from live interviews performed at 31 medical conventions held during 2012, 2013 and 2014. The interviews were conducted on behalf of 9 top-name pharmaceutical and device companies exhibiting at these events.

The live interviews were conducted with visitors at each event as they exited the client exhibit. A total of 1,086 health care professionals (HCPs) were interviewed as they exited pharmaceutical company exhibits and a total of 1,464 HCPs were interviewed as they exited device company exhibits.

Intercepts were random and included both U.S. and international HCPs. Only those questions that were asked in the same way at each event were used for this white paper. Specific events included are listed in the Addendum at the end. Each intercept interview project averaged 83 responses per question, unless noted.



For each area surveyed, we indicate the number of respondents in the sample, as well as the number of exhibits, the number of events, and the time frame.

This paper also references cumulative findings from other qualitative studies conducted by marketech360. Also referenced is third-party research to provide texture and support to the thesis offered.

Combine the experience of the exhibit with increased learning and understanding.

# REPORT HIGHLIGHTS

## Four Major Findings

- The #1 reason why HCPs attend medical meetings is “education.” The #1 reason attendees stop at pharmaceutical exhibits is “booth activity.” This is a dramatic shift from 2008, when “happenstance” and in 2011, when “seeking product information” were # 1.
  - “Booth activity” can include booth attractions, such as product presentations, games, in-booth theatres, photo montages, interactives, donations, 10K runs, and health screenings.
  - These findings clearly indicate a shift towards creating booth experiences that attract visitors to participate in activities that communicate and educate.

The primary reason HCPs attend medical conventions is education.

TOP FIVE REASONS ATTENDEES VISIT PHARMA MEDICAL MEETINGS 2010 vs. 2006-2007 n = 979 / 821			
Reason	2014	2010	2006-07
Education	62%	40%	16%
See what’s new	10%	36%	14%
Speakers / posters	9%	28%	24%
Networking	6%	13%	11%
Exhibits	3%	8%	11%

Source: ©Marketch, Inc. 2014, 2010, 2008  
Exceeds 100% because multiple responses were permitted

TOP FIVE REASONS ATTENDEES VISIT SPECIFIC PHARMA EXHIBITS 2010 vs. 2006-2007 n = 979 / 821			
Reason	2014	2010	2006-07
Product information / Product interest	22%	40%	16%
Activity, promotions, hospitality	50%	36%	14%
Happenstance	22%	28%	24%
Name recognition	12%	13%	11%
See or talk to a rep, see what’s new, booth appeal (tied at 6%)	16%	8%	11%

Source: ©Marketch, Inc. 2014, 2014, 2010, 2008  
Exceeds 100% because multiple responses were permitted

2. The top reason attendees stop at device exhibits was overwhelmingly to “get product information.” This #1 reason is the same as our 2006-2007 findings. Why?
- Our research suggests that device companies do a slightly better job of attracting visitors purposely through pre-event promotions, on-site product demos, and rep engagement on the floor.
  - It’s the hands-on experience that educates attendees about the devices that attracts visitors to these exhibits.

Attendees stop at device exhibits to get product information.



TOP FIVE REASONS ATTENDEES VISIT SPECIFIC DEVICE EXHIBITS n = 1086	
Reason	2014
Product information / Product interest	50%
See what's new	12%
See demo / presentation	12%
Name recognition	8%
See or talk to a rep	6%

Source: ©Marketch, Inc. 2014, 2010, 2008  
Exceeds 100% because multiple responses were permitted

3. 70% of visitors to medical device exhibits said they “learned something new or different” as a result of their visit.
- This is an increase from 62% in 2010. By contrast, 48% of visitors to pharmaceutical exhibits indicated they “learned something new or different” during booth visits, which is a dramatic decrease when compared to the 2010 findings of 62%.
  - This change may be due to issues with product life cycle of pharmaceutical products (more products late in their life cycle), fewer product launches, or the patent cliff.

**LEARNED SOMETHING NEW OR DIFFERENT  
PHARMA**  
2014 vs. 2010 & 2008  
n = 469 / 804 / 590

Response	2014	2010	2008
Yes	48%	62%	62%
No	43%	38%	38%
Not applicable (not a prescriber)	9%		

Source: ©Marketch, Inc. 2014, 2010, 2008

**LEARNED SOMETHING NEW OR DIFFERENT  
DEVICE**  
2014 vs. 2010 & 2008  
n = 543 / 489 / 667

Response	2014	2010	2008
Yes	70%	62%	73%
No	27%	38%	27%
Not applicable (not a prescriber)	3%		

Source: ©Marketch, Inc. 2014, 2010, 2008

Will your  
visitors learn  
something  
new or  
different?

4. 31% (vs. 48% in 2010) of pharma visitors and 47% (vs. 53% in 2010) of device exhibit visitors say they are “more inclined to use, prescribe or recommend, or buy products” seen at the respective exhibits. These results both decreased compared to our last report, despite an increase in learning for device and a decrease in learning for pharma.
- More importantly, for pharma, despite an increase in learning, attendees were not convinced that the differentiators were sufficient to change prescribing habits. At device exhibits, products can be demonstrated to visually and physically provide proof and benefit, which translates into buying behavior change.
  - A significant change in the 2014 results is the increase in the number of “not applicable” responses. This means that the staff is spending time with visitors who are not in the prescribing, recommending or purchasing decision chain.
  - Twenty percent (20%) of pharma responses and 12% of device respondents were not in the decision process.

Device products can be demonstrated to provide benefit.

<b>INCLINATION TO USE, RECOMMEND, PRESCRIBE AS A RESULT OF THE VISIT PHARMA</b> 2010 vs. 2010 & 2008 n = 1247 / 711 / 549			
Inclination	2014	2010	2008
More	31%	48%	43%
Less	1%	1%	1%
Same	41%	51%	55%
Not applicable (not a buyer)	20%		

Source: ©Marketch, Inc. 2014, 2010, 2008

<b>INCLINATION TO CONSIDER, PURCHASE, RECOMMEND AS A RESULT OF THE VISIT DEVICE</b> 2010 vs. 2010 & 2008 n = 1004 / 474 / 199			
Inclination	2014	2010	2008
More	45%	53%	41%
Less	4%	3%	2%
Same	37%	44%	42%
Not applicable (not a buyer)	14%		

Source: ©Marketch, Inc. 2014, 2010, 2008



## Other Highlights

- Attendees reported that their “objectives were met” during their visit to the exhibits studied. They rated their experiences 3.8 and 4.12 out of 5 for pharma and device, respectively.
- A total of 72% of pharma exhibit visitors reported being immediately engaged by a rep vs. 92% reported in the 2010 study. This is below the 2008 reported results, as well.
- Unlike the 2010 study, we did not evaluate “the value of information received” in this update.

## Key Takeaways for Improved Exhibit Performance

Four key takeaways stand out as a result of these findings:

1. Get on your attendees’ meeting agenda.

To generate desired traffic, use techniques that best resonate with your specific audience. Additional research may be needed to determine how your target audience wants your messages delivered to them.

2. Incorporate exhibit promotions, challenges, and interactions that are meaningful.
3. Attendees respond best to staff who are both customer-focused and product knowledgeable.
4. Create an attendee experience that not only engages and captures attention, but also compels the visitors to take desired actions as a result of their visit.



## HCPs Attend Medical Meetings to Learn in a Variety of Ways

HCP access continues to be an issue. In its syndicated AccessMonitor report (Spring 2013 edition), ZS Associates (Evanston, IL) reports that 45% of all physician practices place restrictions on rep access. (source: Pharmaceutical Commerce, July 2013) We continue to conclude that HCPs are getting less of their information through face-to-face interaction with reps in the field. If this is the case, where do HCPs get their information?

Various surveys cite industry association and trade meetings among the 3 top physician sources for product information. In addition, our own studies find that 54% of 780 HCPs at 9 events were attending no other events during the study year.

In this most recent study, we asked 655 HCP's their top 6 reasons for attending a medical meeting. They were:

1. 62% - Conference program/educational opportunities
2. 10% - See what's new
3. 9% - Featured conference speakers
4. 6% - Networking
5. 3% - Location
6. 3% - Exhibits

These are significantly different than reported just 2 years ago, when location was #2 and exhibits was #4 cited by about 1/3rd of the respondents.

Considering the data collected, "learning" continues to be the driving force in the rationale for attending medical meetings. Whether it is CME events, seminars, workshops, on-the-floor labs, off site sponsored CME events, the desire to learn and keep up-to-date drives HCP meeting attendance.

"Learning" continues to be the driving force in the rationale for attending medical meetings.

An equally important target audience is HCPs.

Use pre-event promotions customized to your audience.

At primary care meetings, an equally important target audience is HCPs who are not physicians. These include physician assistants (PA) and nurse practitioners (NP), who are not usually seen by pharmaceutical or device reps other than as gatekeepers, but they are attending medical conferences and exhibitions in growing numbers. This is clearly evidenced at the PriMed series of medical shows and specialty events, such as American Association of Diabetic Educators, or Association of Critical Care Nurses – National Training Institute.

If one takes all of these findings together, they suggest that exhibiting and participating at medical meetings are important elements in the marketing mix as a strategy to get face-to-face with HCPs, whether they are buyers or prescribers or not.

## WHAT'S NEXT?

Our findings tell us:

- **Visitor *happenstance* is not a strategy.** We can no longer depend on “happenstance” to attract qualifiable visitors to our exhibits.

CEIR has reported that 3/4 of attendees come to a convention with an agenda. You must be on their agenda to get a share of their time while visiting the medical convention expo by using pre-event promotions customized to the target audience.

- With learning being the primary driver for HCPs at medical conventions, every time you plan an event, **you need to think in terms of how you are going to impact attendee learning** – learning that will result in greater inclination to recommend, prescribe, use, or buy.
- **Promotions** – If appropriate, use approved (PhRMA and AdvaMed, plus specific state regulations) promotions that are meaningful, have high-perceived value, and promote learning.

- **Actively recruit customer-focused reps** from the ranks of field sales, marketing and other internal resources.
- **Create a learning experience** using a variety of tools:



- » One-on-one conversations
- » e-details
- » Product demonstrations (individual or on-demand)
- » KOL live theatre
- » Video
- » Live presentations (Expert Centers)
- » Case studies (using AV interactives)
- » Interactive AV
- » Product theatres
- » Quizzes
- » Challenges
- » Pre-arranged meetings/demonstrations
- » Lunch and Learn
- » KOL led discussions
- » Attendee driven roundtables
- » Disease awareness presentations
- » Expanded exhibit environments for networking among HCPs

- **Encourage sales reps to personally invite their physicians or buyers to specific shows** and give the invited person a valid reason to stop at the exhibit.
- **The exhibit staff is the key ingredient to every exhibit.** It is an opportunity to detail or have a conversation with healthcare professionals in an entirely different environment, where you have the visitor's attention and interest without office distractions and time limits.

One of the best pre-show promotions is to have representatives personally invite HCPs in advance of the event.

The more interaction and hands-on activity, the greater the memorability.

- **Technicians are already familiar with the product, but they must be taught the skills needed to demonstrate products at events.** The approach is different than when demoing in the field: (1) understand the information needs of the attendee and focus the demo on those needs, (2) determine how to link the demo activity to successfully addressing the “proof and benefit” requirements of the HCP, and (3) be able to deliver a “BIG idea” when summing up the experience that includes mentioning the brand name.
- **Non-physicians are becoming a larger portion of attendee demographics.** Don't chance losing the opportunity to advance your selling process by ignoring non-physician attendees. Address their needs with specialized communication vehicles. Impress them by engaging them. When they feel good about their experience, they will tell others. Viral marketing is alive and working at events. Remember that physician assistants, nurse practitioners and other healthcare providers who consider and suggest pharma solutions can become recommenders and influencers, and are just as important as physicians in today's healthcare market.
- **Engage every potential prescriber or buyer - don't ignore them,** as they may be your next high decile buyers if they can be converted. And, they cannot be converted if they are not engaged in a dialogue.
- **Be creative in transforming “known information” into something new.** Is there a new indication for the product or service offered? With devices, create a hands-on experience that will increase the visitors' skill level and give them greater confidence to try the products.

Remember, the more interaction and hands-on activity, the greater the memorability. The greater the memorability, the more chance of increasing the learning that will take place.

To best leverage face-to-face marketing opportunities, it is vitally important for healthcare exhibitors to be aware about what prompts meeting attendance, exhibit visitation, what techniques can be used to aid in HCP learning, and what drives the likelihood of future prescribing, use, or recommendation.

# ADDENDUM

## Medical Events Used for this Study – By Segment

### Device

Three well-known medical device companies who provide such things as surgical instruments, imaging, diagnostics and centrifugation were studied at 7 different shows held during 2010-2014. Device companies studied have asked us to not reveal their names, as this would violate non-disclosure agreements now in place.



Shows where device companies were studied:

- AACC
- AAOS
- ACC
- ASTRO
- ASM
- HIMSS
- SIR

### Pharma

Four large pharmaceutical companies were studied at 9 different meetings held during 2010-2014. Examples of medications manufactured are for (but not limited to) heart, diabetes, GERD, and PNP. We have non-disclosure agreements with all Pharma companies studied, which prevent us from disclosing their names in a public paper.



Shows where Pharma companies were studied:

- AACE
- AAFP
- ACC
- ADA
- AHA
- ASCO
- ICAAC
- PMS
- PMW

The study included 7 medical shows and 9 medical meetings.

# ABOUT MARKETECH360

The leader in exhibit and event performance improvement for more than 29 years, marketech360 offers a full range of customized, timely, and affordable trade show staff training, performance measurement, event staffing, and program planning services and products that improve the results exhibitors achieve through their trade show marketing activities.

Based in Birmingham, AL, marketech360 clients range from Fortune 100 companies to small start-ups, and offerings are appropriate for all industries. The staff comes from multi-disciplinary backgrounds, providing depth of expertise to all clients. All programs are marketing oriented in support of a deep belief that exhibiting is a marketing communications tool utilized to achieve higher organizational objectives.



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