

The Future of Healthcare Exhibiting is Learning

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An Exclusive Industry Analysis
by marketech360

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FORWARD

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.

This white paper explores the important connection between LEARNING and successful exhibiting, and strives to give the reader new ideas and insights into the critical success factors that contribute to LEARNING in a convention environment.



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OVERVIEW & APPROACH

“The Future of Healthcare Exhibiting” is the latest in a series of white papers produced by marketech360 to help healthcare exhibitors understand current trends in our industry.

Based on proprietary research conducted by marketech360, this report shares important revelations about our ever-changing environment and is a valuable tool healthcare exhibitors and others can use to successfully navigate the future of healthcare exhibiting.

Our two prior white papers – “Why Physicians Come to Your Exhibit” and “Dynamics of Healthcare Marketing for Healthcare Professionals” – were published in 2005 and 2008, respectively. The 2005 white paper was based on data collected in 2004-2005 and the 2006-2007 white paper was based on data collected in 2006-2007. Where feasible, comparisons are made to these prior studies.

At the cornerstone of this analysis are cumulative quantitative findings from live interviews performed at 16 medical conventions held during 2010. The interviews were conducted on behalf of 10 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 979 health care professionals (HCPs) were interviewed as they exited pharmaceutical company exhibits and a total of 704 HCPs were interviewed as they exited device company exhibits.

Intercepts were random and respondents were pre-screened to include only U.S. based HCPs. Only those questions that were asked in the same way were used for this white paper. Specific events included are listed in the Addendum at the end. Each intercept interview project averaged 100 responses per question.

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, as well as third-party research to provide texture and support to the thesis offered.



Discover important revelations about our ever-changing environment.

A valuable tool healthcare exhibitors can use to successfully navigate the future of healthcare exhibiting.

The primary reason for attending medical conventions is “seeking product information” or learning.

REPORT HIGHLIGHTS

Four Major Findings

1. The number one reason attendees stop at pharmaceutical exhibits is “seeking product information.” This is a dramatic shift from 2006-2007 where “happenstance” was number one. “Happenstance” can include brand familiarity, booth appeal and booth attractions such as refreshments and product presentations. These findings clearly indicate a positive shift to reinforce the primary reason for attending medical conventions – learning.

2. The top reasons attendees stop at device exhibits are because they have an “interest in the products” or they “wanted to see a specific demo”. This number one reason is the same as our 2006-2007 findings. Why? Our research suggests that device companies do a slightly better job of drawing visitors purposely through pre-advertised products, rep demos and rep engagement on the floor. It’s the hands-on experience that attracts visitors to these exhibits.

3. A total of 62% of visitors to medical device exhibits said they “learned something new or different” as a result of their visit. This is a drop from 73% in 2006-2007. By contrast, 62% of visitors to pharmaceutical exhibits indicated they “learned something new or different” during booth visits, which is identical to the 2006-2007 findings. The differences primarily seem due to: There are not as many new devices being offered – expansions of current devices, and many pharma companies have adopted interactive edu-taining tools that have helped communicate their message more effectively to maintain learning in an environment of few new products.

4. A total of 48% of pharma visitors and 53% of device exhibit visitors say they are “more inclined to use, prescribe or recommend, or buy products” seen at the respective exhibits. This statistic has risen five percentage points for pharma exhibit visitors and seven percentage points for device exhibit visitors. More importantly, if they learned something new, visitors were more inclined to use, prescribe, recommend, or buy vs. if they did not learn anything new (32% for pharma visitors and 38% for device visitors).

Other Highlights

- Nine out of 10 (90%) pharma exhibit visitors reported having a meaningful discussion with a rep vs. more than six out of 10 (66%) of device exhibit visitors.
- A total of 92% of pharma exhibit visitors reported being immediately engaged by a rep vs. 80% reported in the 2006-2007 study. But, only 65% of device exhibit visitors reported being immediately engaged by a booth staffer vs. 79% in the 2006-2007 white paper.
- A total of 69% of pharma exhibit visitors reported having “very valuable” interactions with exhibit staff.

Key Takeaways for Improved Exhibit Performance

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

1. It is important to **get on your attendees’ agenda**. If the focus of attendee visitation is product information and product interest, then letting attendees know what is available in your exhibit in advance of their arrival and in time for planning their meeting agenda is critical to selectively attract your target audience.
To purposely generate desired traffic, use techniques that best resonate with your specific audience; be it direct mail, email or personal invitations by field sales reps. Sometimes 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** – ones that have a highly perceived value and ones that create memorability. Being creative in your choice of attractions generates interaction, which yields memorability.
3. Attendees respond best to **staff who are both customer-centric and product knowledgeable**. A good booth staffer needs to be able to mesh the attendees’ specific objectives in visiting your exhibit with customized information (learnings) in order to generate a greater inclination to prescribe, use, buy, or recommend more of your product.
4. Design your exhibit to **create an attendee experience** that not only engages and captures attention, but also compels the visitors to take positive actions as a result of their visit.

Where do HCPs get their information today?



INTRODUCTION

If you are a company serving the needs of HCPs, it is important to understand how HCPs stay current with recent developments in their field, including developments in the products and services available to them.

According to a recent Medical Meetings physician survey and other industry research, pharma and device reps today are being hampered by limited access to their HCP prospects and customers. In some instances, sales reps have actually been denied access to some physicians' offices. As a result, we can conclude that HCPs are getting less and 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 today?

Various surveys cite industry association and trade meetings among the three top physician information sources for product information, and about 80% of physicians interviewed planned to attend at least one medical meeting a year. A total of 38% of physicians surveyed by Medical Meetings indicated they would attend more local meetings, 33% had no plans to change their travel plans and 50% indicated they were going to find alternatives to traveling to earn their CME credits.

A Tradeshow Week Executive Outlook report indicates the number one reason physicians attend medical events, in general, is for the conference program associated with educational opportunities. The top five reasons cited were:

1. 92% - Conference program/educational opportunities
2. 67% - City location
3. 42% - Featured conference speakers
4. 33% - Exhibits
5. 33% - Networking opportunities

If you take findings from this report one step further and consider the objective associated with each of these reported reasons, you will find that "learning" is attached to four out of



five. The only one that is not attached to “learning” is city location, and that might be inferred to mean “networking” or “focus on local issues.”

Our own research reinforces these findings. According to our studies, conferences and meetings are a key way HCPs obtain information on clinical topics. Drilling down further, we found that 66% of those attending specialty meetings come for CME, education or updates i.e. to learn. Similarly, 61% of those attending primary care meetings come to learn.

Equally important is the increase in patient care provided by HCPs who are not physicians. These include physician assistants (PA) and nurse practitioners (NP) who are not usually seen by pharmaceutical or device reps, but 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.

In addition, current research by *Exhibit Surveys* indicates only 27% of health professionals who attended medical shows reported they were called on by a salesperson connected with the exhibiting company within the previous 12 months. This is up from 24% in 2006. The low percentage from this study is likely due to the fact that most large companies focus calls on the top two decile targets (higher prescribers/buyers) more so than on the lower deciles while *Exhibit Surveys*’ research includes people within all decile levels.

Taken together, these observations suggest that exhibiting is an important element in the marketing mix as a strategy to get face-to-face with HCPs. To best leverage opportunities in this medium, it is vitally important for healthcare exhibitors to be knowledgeable about what prompts booth visitation; whether or not visitors are learning new or different information, or are helped in recalling previously learned information; and what drives the likelihood of future prescribing, use, or recommendations.

Exhibiting is an important element in the marketing mix as a strategy to get face-to-face with HCPs

KEY FINDINGS

Why HCPs Attend Medical Conferences

To better understand why HCPs attend medical conferences, we conducted a study to identify key drivers of attendance at both specialty and primary care meetings. Our findings are presented in Table 1 and Table 2.

Over 60% of HCPs will attend Conferences for CME/Education/Updates.

Table 1

TOP FIVE REASONS FOR ATTENDING SPECIALTY MEETING n = 91	
Reason	%
CME/Education/Update	66%
Poster presentation	18%
See what's new	7%
Association support	4%
Networking	4%

Source: ©Marketch, Inc. 2010

Table 2

TOP FIVE REASONS FOR ATTENDING PRIMARY CARE MEETING n = 107	
Reason	%
CME/Education/Update	61%
Poster presentation	17%
See what's new	4%
Association support	3%
Networking	2%

Source: ©Marketch, Inc. 2010

When looking at both specialty and primary care meetings, the most frequently cited reason for attendance was "CME/Education/Updates", however, this reason was cited less frequently by those attending primary care meetings. Conversely, attendees at primary care meetings cited "see what's new" more frequently than those attending specialty meetings.

Where and How HCPs Get Their Information

To better understand where and how HCPs get information on clinical topics, we posed a series of questions to 89 HCPs at a specialty meeting. The sample size is smaller than most others in this paper; however, the findings give an indication of how we should be viewing the changing and challenging question of channels of communication. Our findings are detailed in Table 3.

This study reinforces findings from other surveys and further demonstrates that conferences/meetings are an important information resource for HCPs.

Table 3

WHERE HCPs GET INFORMATION ON CLINICAL TOPICS n = 89	
Source	%
Clinical journals	31%
Websites	28%
Conferences / Meetings	17%
Colleagues	13%
Drug Reps / Sales Reps	4%
News / Press	3%
email	2%
Newsletters	1%
Other	1%

Source: ©Marketch, Inc. 2010

Attendees of Primary Care Meetings cited “see what’s new” more frequently than those attending Specialty Meetings.

Use of Web 2.0 Applications

Table 4

Social Networking Preferences n = 89	
Application	%
Facebook	32%
YouTube	25%
Twitter	7%

Source: ©Marketch, Inc. 2010

As part of this study, respondents were asked about Web 2.0 applications they currently use. Our findings are detailed in Table 4.

More than half (51%) indicated they use no Web 2.0 applications other than social networking. For those using social networking, Facebook (32%), YouTube (25%) and Twitter (7%) were the preferred Web 2.0 applications used.

Table 5

HOW HCPs WANT TOPICS PRESENTED n = 160	
Preference	%
Clinical benefits (disease oriented)	86%
Technical benefits/features	44%
Workflow/process benefits	28%
Business benefits/business cases	24%
No preference/don't know	2%

Source: ©Marketch, Inc. 2010

HCPs Preferences on Topic Presentation

Our study also included a query to better understand how HCPs want medical technology topics presented. Our findings are presented in Table 5.

*Exceeds 100% because multiple responses were permitted.

It is important to understand how the younger generation of attendees perceives conventions. A recent CEIR study was not specific to attendees at medical conventions, but the results give us insight into how this demographic thinks and feels about this face-to-face medium.

What the Under 40 Age Group of Attendees Want & Need

Key findings include the following observations:

- The #1 objective in attending conventions is education.
- 70% reported that their learning objective was met from seminars or from exhibits.
- 80% have a generally positive impression of exhibits.
- 73% view exhibitions a worthwhile expenditure of time away from work to visit.
- Attendees get their information about exhibits from:
 - 57% Association
 - 56% emails from colleagues
 - 50% Direct mail
 - 40% Websites
- Most trusted sources of information about expos:
 - Industry associations
 - websites
 - colleagues
- 56% prefer email communications
- They don't rely on social networking for anything other than social
- How to communicate with this audience
 - Be brief
 - Be focused
 - Use testimonials
 - Make communications accessible on various platforms

What Prompts Specific Booth Visitation – Pharmaceutical

Since we know that, in general, HCPs go to medical conventions to learn, we wanted to know what attracted them to specific exhibits. This has become an increasingly important question given the marked downturn in attendee visitation to the exhibition hall.

Table 6

TOP FIVE REASONS ATTENDEES VISIT SPECIFIC PHARMA EXHIBITS 2010 vs. 2006-2007 n = 979 / 821		
Reason	2010	2006-07
Product information / Product interest	40%	16%
Activity, promotions, hospitality	36%	14%
Happenstance	28%	24%
Name recognition	13%	11%
See or talk to a rep	8%	11%

Source: ©Marketech, Inc. 2010, 2006-2007

To answer this question for pharmaceutical company exhibitors, we interviewed 979 attendees who visited 12 different exhibits at 11 different medical conventions held throughout 2010. A side-by-side comparison of findings from our 2010 and 2006-2007 studies reveal several differences as shown in Table 6.

*Exceeds 100% because multiple responses were permitted.

The Importance of “Product Info/Interest” vs. “Happenstance” Visitation

In our 2010 study, “product information/product interest” was the number one reason attendees visited, with 40% citing this as a key driver. In the 2006-2007 study, “happenstance” was the number one reason, with 24% citing this as a key driver. Getting “specific product education” or “information” was the number two reason in 2006-2007, however, even as the #2 response, only 16% cited this as a key driver compared to 40% in 2010.

This shift toward “product information/product interest” is important because it suggests that education and learning was transferred to exhibition objectives. Equally important was the drop in “see or talk to a rep.” This could indicate that not enough effort was dedicated pre-event to arrange appointments or on-site meetings in advance.

More education and learning was transferred to exhibition objectives in 2010.

Further, this change from 2006-2007 is important because it recognizes that attendees are visiting exhibitions with an agenda. With “happenstance” falling to third, it indicates that fewer visitors are arriving with no planned destinations. This is further supported by the fact that name recognition jumped from 4% in 2005 to 11% in the 2006-2007 study and 13% in the current study.

How does name recognition fit? A planned visitation can be generated by such factors as name or product recognition (know of them, so will visit them). Other driving factors are: rep engagement, a promotional sponsorship, and general booth appeal (looks interesting so will go inside to see the rest of the exhibit).



Generating a Need to Attend

In the past, seated live and multi-media presentations were being heavily used by pharmaceutical company exhibitors and those activities drew crowds. Crowd levels fueled visitation. We noted that companies have continued to move toward individualized computerized presentations (e-details) and/or computerized quizzes and challenges, which tend to draw smaller groups of people to any one location.

It may also be that today's attendees go to conferences more to get CME credits than to find out about new products on the exhibit floor, which may be a by-product of internet interactions. Case in point, many pharmaceutical companies have signed up their target physicians to receive news updates via email. Many of the e-details and lead management software offerings allow for “opt-ins” for electronic communications. This has become a significant in-booth activity for many healthcare exhibitors. Some have even incorporated a quantitative goal for “opt-ins”.

Generating a need to attend the exhibits has become a more important strategic objective for exhibitors in the current environment.

Other Observations

In our 2010 study, “booth appeal” was not among the top five reasons. When “happenstance” is as high as it is (28%), then booth appeal is especially critical because the visual attraction of the exhibit is what mostly generates “happenstance” visitation.

Booth appeal includes size, clear messaging, cleanliness, ease of navigation and appealing booth design. Booth size and location do matter when considering visitation without an agenda.

The impact of pre-show promotions on prompting booth visitation has remained low at 9% (vs. 2% in 2006-2007). The best pre-show promotions for pharma companies are to have representatives personally invite physicians in advance of the event, include a coupon insert in the conference bag redeemable for a giveaway, or arrange hotel drops during the show to advertise an activity in the exhibit. There has been some recent pushback with in-room promotions, as they seemingly violate the attendees' personal space.

Activities such as knowledge quizzes, challenges, and games are also among the attractions that are seemingly working with "activity, giveaways, and hospitality" cited by 36% as reasons attendees visited pharmaceutical company exhibits.

What Prompts Specific Booth Visitation – Device

To better understand what attracted visitors to specific device company exhibits, we interviewed 704 attendees who visited seven different exhibits at six different medical conventions held throughout 2010. Highlights of our findings are presented below. A side-by-side comparison of findings from our 2010 and 2006-2007 studies reveal several differences as shown in Table 7.

Table 7

TOP FIVE REASONS ATTENDEES VISIT SPECIFIC DEVICE EXHIBITS 2010 vs. 2006-2007 n = 704 / 884		
Reason	2010	2006-07
Product information / Product interest	42%	29%
See what's new	24%	14%
See demo / presentation	22%	16%
Name recognition	17%	12%
See or talk to a rep	14%	14%

Source: ©Marketch, Inc. 2010, 2006-2007

*Exceeds 100% because multiple responses were permitted.

In 2010, "product information/product interest" was number one at 42%, up from 29% in 2006-2007. This suggests that device companies did a better job drawing visitors purposely,

One of the best pre-show promotions for pharma companies is to have representatives personally invite physicians in advance of the event.

At least four of every 10 visitors are already customers.

Many attendees at device exhibits self-navigate the exhibit.

with an agenda, through pre-advertised products, rep demos and rep engagement on the floor. However, “happenstance” was 20%, which was up from 7% in 2006-2007, and is still number six on the list.

Attendees at device-focused exhibitions typically come to see specific products and usually seek out products within their specialties. They look for technology leaders and they find technical exhibits to be of significant value in their searches for new techniques and procedures.

Because the general audience mix at device exhibits includes direct buyer attendees, we notice a higher tendency toward preset agendas at device meetings than at pharmaceutical-focused shows.

Name recognition is strong at 17%, up from 11% in 2006-2007. Our research has found that, in general, at least four of every 10 visitors are already customers.



Overall, giveaways as a booth visit enticement on the device side is considerably lower than on the pharma side; however, food and beverage was about the same - 7% for device and 9% for pharma. The primary issue with hospitality is the “grab and go” element where the hospitality does not add to the booth traffic or interaction rates.

Because device show visitors come to see what’s new, participate in product demos, talk to staff to obtain product information, and that they are seeking this information from recognized sources of the products, the interactions are less focused than pharma exhibits. We found that many attendees at device exhibits self-navigate the exhibit and, at times, don’t have staff interactions since many demonstrations are self-administered.

Since product is the focus of a device exhibit, booth appeal tended to be lower than with pharma exhibits. It is nevertheless important for exhibit design to accommodate clear messaging about what the visitor is seeing on demo, as well as ease of navigation in terms of product access.

Characteristics of Exhibits That Attract Visitors

Our observations have found both pharma and device company exhibits that are the most effective, and achieve their exhibiting objectives, have these five characteristics in common:

1. A good hierarchy of messaging – your company name at the top to draw attention to the exhibit from afar (who we are), product branding and product benefit messaging at eye level (brand name, what it does), and more detailed copy at a close-up level.
2. Ease of navigation – a booth that has adequate space for booth properties, equipment on display, and staffing to afford comfortable, uncongested walking-around space i.e. ease of access and comfortable traffic flow.
3. Good exhibit design – exhibit design that creates a mood, communicates the brand value, and provides an environment for visitors to experience the products.
4. Memorable messaging – a booth environment that delivers a lasting message through a combination of visual and verbal (staff) communications.
5. Assertive and enthusiastic staff performance – staff that are trained to specifically work the convention environment, and therefore create a memorable experience for the attendees.

Use of Promotions and Sponsorships in Promoting Traffic

Many exhibitors use promotions and sponsorships to drive traffic. But our findings (above) about what prompts booth visitation tell us that promotions and sponsorships don't seem to be key drivers.

To more fully understand the impact promotions and sponsorships have on driving booth

Promotions and sponsorships do more to raise brand awareness than to drive traffic to an exhibit.

traffic, in 2010 we undertook a more specific study focused on this topic. The results were not unexpected given other work undertaken in this area over the past several years. Our conclusion is that, overall, promotions and sponsorships do more to raise brand awareness than to drive traffic to an exhibit.

Table 8

SAW AN AD OR SPONSORSHIP n = 98	
Response	%
Yes	51%
No	49%

Source: ©Marketch, Inc. 2010

As a second step, we asked those who indicated they'd seen an ad or sponsorship to identify specifically what they'd seen. This question was asked unaided, i.e. no hints or clues were provided to aid recall. Although 16% of the respondents who remembered seeing an ad or sponsorship couldn't recall anything specific, the majority (84%) were able to cite at least one specific ad or promotion.

Table 10

AD OR SPONSORSHIP PROMPTED VISITATION n = 50	
Response	%
Yes	24%
No	76%

Source: ©Marketch, Inc. 2010

As a first step in the study, we identified how many of the 98 HCPs surveyed recalled seeing an ad or a sponsorship with the exhibitor featured. Just over half (51%) indicated they remembered seeing an ad or promotion.

Table 9

RECALLED SPECIFIC AD OR SPONSORSHIP (UNAIDED) n = 50	
Response	%
Yes	84%
No	16%

Source: ©Marketch, Inc. 2010

As a third step, we asked those who remembered seeing an ad or sponsorships if what they saw prompted them to visit the exhibit. A total 76% responded that it did not.

Table 11

MESSAGE RECALL n = 50	
Response	%
Yes	29%
No	71%

Source: ©Marketch, Inc. 2010

memorable message, these vehicles may not be achieving the desired result.

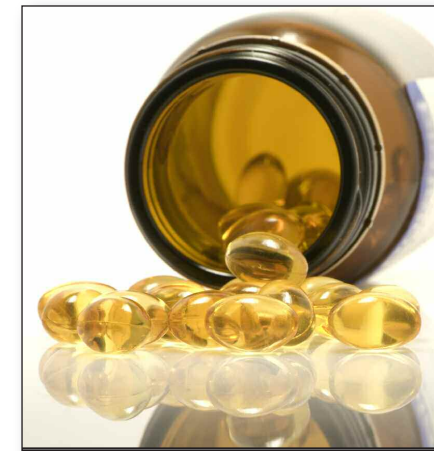
As a forth step, we asked those who remembered seeing an ad or sponsorship if they recalled any specific messaging included in the ad or sponsorship. A total of 71% did not recall any messaging. This tells us that if increasing brand awareness is the objective, then ads and promotions may be meeting the goal. But if the intent is to deliver a specific,

Other Observations

As an interesting side note, participants were shown photos of specific ads and promotions once the previous series of questions was answered. With this aided recall, 91% of the respondents recalled seeing at least one of the ads or promotions included in the study. Specific recollection for individual ads or promotions ranged from 14% to 59%. The fact that some ads or promos were more memorable than others could be attributed to factors such as the type and/or location of the ad or promo, the visual appeal of the ad or promo, or other considerations.

Respondents were also queried about the impact of a downloadable e-guide that was offered by the exhibitor. A total of 67% who were prompted to visit due to the e-guide did not find it useful. Therefore was it memorable?

Also interesting was that ads and sponsorship were more noticed by U.S. visitors than international visitors. And, consequently, more U.S. visitors were prompted to visit due to the ads and sponsorships than International participants.



Exhibitors must find the appropriate vehicle with which to deliver a specific, memorable promotional message.

Staff Performance – Pharma

We know that a major component of any exhibitor's success is related to the performance of the staff and the quality of the interactions they have with booth visitors.

Quality of Staff Interaction

To better understand visitor perception of staff performance, our 2010 study included a query posed to 536 HCPs who visited 13 pharma exhibits at six different events about the interaction they had with the staff.

Almost nine out of 10 (87%) said that staff interactions were "meaningful." In 2006-2007, we assessed staff performance by asking visitors to rate the value of their exchanges. In the prior study, nearly seven out of 10 (69%) told us staff interactions were "very valuable." These are outstanding responses in both categories.

This is a critical element in the "learning focus" of exhibitions. If visitors leave reporting that their interactions were both meaningful and very valuable, then their objectives were being met through their interactions with the assigned booth staff. This metric will come into play as we further discuss the future of healthcare exhibitions.



Visitors' objectives are being met through their interactions with the assigned booth staff.

Implications for Booth Staffing

This element has additional importance for exhibitors who are considering replacing sales reps with booth temps (temporary help) in an effort to achieve cost savings. Sales reps bring

product knowledge that translates to learning for the attendees, and that has a direct correlation on the inclination to prescribe, use, buy, or recommend in the future.

Where temps can add value and enhance booth staff effectiveness is in aiding the staff in engaging, qualifying and transitioning. Since the one area of staff performance that always lags is assertive engagement, trained personnel who can assist the company's booth staff by "teeing" up qualifiable visitors can make the effectiveness of the exhibit even greater.

How Information Is Communicated

Most pharmaceutical company exhibitors now incorporate "e-detailing" stations (stationary computer presentations) or other individual portable electronic presentation devices (e.g. tablet PCs, iPADS) within their exhibits.

Because visitors who are detailed in this manner are usually required to have their badges swiped, these devices can also track numbers of presentations and flow-through traffic count, which are good measurement guidelines. It is a method that generally requires the visitor to "voluntarily" step up and get a badge swiped in order to get the information, rather than step into a presentation anonymously.

It is vitally important to understand the target audience's preferred method of information delivery before investing in newer technology to assure that it will attract and result in a meaningful dialogue and information transmittal yielding learning.

Staff Performance – Device

Similar to the pharma study, 240 HCPs at seven events reported they had "meaningful interactions" with booth staff at device-focused events. This is lower than pharma due primarily to the nature of device exhibitions where many visits do not include a face-to-face interaction, but self-administered type product demonstrations.

"Teeing" up qualifiable visitors can make the effectiveness of your exhibit even greater.

Understand the target audience's preferred method of information delivery.

Exhibitors need to focus more on making that important first engagement.

How Visitors Were Greeted – Pharma

Table 12

HOW VISITORS WERE GREETED PHARMA 2010 vs. 2006-2007 n = 826 / n = 673		
Response	2010	2006-07
Greeted & engaged	92%	80%
Noticed but not engaged	6%	12%
Ignored	2%	8%

Source: ©Marketch, Inc. 2010, 2006-2007

To better understand the visitor experience, 826 HCPs were asked about what happened when they entered specific pharma company exhibits at nine events included in our study. A total of 92% were greeted and engaged by a booth representative; 6% were noticed, but not engaged by a representative; and 1% was

ignored. These findings are up substantially from the 2006-2007 study, as shown in Table 12. Substantial headway was made increasing staff effectiveness in this area.

How Visitors Were Greeted – Device

Table 13

The same question was posed to 60 HCPs at one device-focused event. In our 2006-2007 study, the results were very close to our pharma findings, however, in 2010, the findings were substantially different from pharma.

In exploring why this outcome occurred, we must consider that this question was only asked at one event in 2010. In

HOW VISITORS WERE GREETED DEVICE 2010 vs. 2006-2007 n = 60 / 266		
Response	2010	2006-07
Greeted & engaged	65%	79%
Noticed but not engaged	25%	13%
Ignored	0%	8%
Mutual	10%	n/a

Source: ©Marketch, Inc. 2010, 2006-2007

addition, a new reporting category evolved. Some visitors simply didn't feel that any of the other categories appropriately described their experience, so a new category – "mutual" – was added to our data capture.

We interpret this to mean that visitors are becoming more proactive in seeking out assistance if it is not provided, and are engaging staff, thereby making the experience a mutual one. Based on this disparity in findings, in the future, device exhibitors need to focus more on making that important first engagement in order to make the experience more impactful from the beginning.

Learning Something New or Different – Pharma

Since we know attendees come to medical conventions to learn, we wanted to better understand the degree of learning taking place on the show floor as a result of a visit to an exhibit.

We queried 804 HCPs at 13 exhibits at 10 events to determine levels of learning. Table 14 details findings from our new 2010 study as well as findings from 2006-2007.

Table 14

LEARNED SOMETHING NEW OR DIFFERENT PHARMA 2010 vs. 2006-2007 n = 804 / 590		
Response	2010	2006-07
Yes	62%	62%
No	38%	38%

Source: ©Marketch, Inc. 2010, 2006-2007

In 2010, we note that about two-thirds (62%) said they learned something new or different about the company or products reviewed. In the prior study, the same number (62%) indicated they learned something new or different.

The rates of learning may be constant because the learning tools used are confirmed as being effective. These tools include e-details, interactives, and other electronic media. Another

Exhibit interactions have become a more important opportunity for new learning.

When the demos and product information being delivered are more focused, they are more meaningful to your visitors.

possible reason might be that with in-office detail visits decreasing in length, along with the increasing number of “no-see-‘ems”, exhibit interactions have become a more important opportunity for new learning.

Learning Something New or Different – Device

We explored learning on the device side using the same approach. We queried 489 HCPs at seven exhibits at four events. Table 15 details findings from our new 2010 study, as well as from the prior study.

When we compare device to pharma in terms of new learnings, it is interesting to see that rates of learning were the same (62%) for both segments. However, when we consider findings from year to year, it seems that in 2006-2007 the device side did a better job of imparting new or different learnings to visitors than did the pharma side.

Table 15

LEARNED SOMETHING NEW OR DIFFERENT DEVICE 2010 vs. 2006-2007 n = 489 / 667		
Response	2010	2006-07
Yes	62%	73%
No	38%	27%

Source: ©Marketech, Inc. 2010, 2006-2007

We feel this is largely due to the reduced number of new products being introduced on the device side at events in 2010 as compared to 2006-2007.

Our research also found that when asked what visitors learned, the 62% who said they learned something new or different in 2010 tended to cite very specific learnings vs. in 2006-2007, where the learnings cited by the 73% who learned something new or different were more general. This leads us to believe that the demos and product information being delivered are more focused, and therefore more meaningful to the visitors.

In any case, these findings support the value of presentations where seeing, touching and experiencing the products in some manner is critical to the learning impact. Device is good at this. On the pharma side, this is getting better with more experiential exhibits. This element of healthcare exhibiting will be examined later in this paper.

In the exhibit environment, the overriding objective is to create an event experience that is remembered when it is time to buy, use, recommend, or prescribe. New learning can come through hands-on demonstrations, communicating a new use for the product that will help healthcare professionals increase their skill levels and to try a new procedure, or from interactive games that challenge the physicians' knowledge and present key messages.

Impact on Use, Prescribing, Recommending – Pharma

To assess visitors' inclination to use, prescribe or recommend products seen in an exhibit, we queried 711 HCPs at 18 exhibits at eight events. Respondents were asked if they were more or less inclined to use, prescribe or recommend as a result of their visit, or if their inclination was unchanged. Findings from our new 2010 study, as well as findings from our prior study completed in 2006-2007 are shown in Table 16.

Table 16

INCLINATION TO USE, RECOMMEND, PRESCRIBE AS A RESULT OF THE VISIT PHARMA 2010 vs. 2006-2007 n = 711 / 549		
Inclination	2010	2006-07
More	48%	43%
Less	1%	1%
Same	51%	55%

Source: ©Marketech, Inc. 2010, 2006-2007

In our original 2005 research we found that 33% of visitors to all medical shows (both pharma and device) at 16 conferences were "more inclined" to use, prescribe, or recommend medical products/services as a result of their respective booth visits.

In 2006-2007, we separated out pharma from device and

As learning increases, so does inclination to take a future positive action.

53% of visitors were “more inclined” to consider, purchase, or recommend products after having visited a device exhibit.

found there was no significant difference between the groups. The percentage of “more inclined” increased for both segments.

In 2010, we maintained the separation of pharma and device, and for pharma we found that the inclination to recommend or prescribe increased to 48%. As learning increases, so does inclination to take a future positive action. See Table 13 for the full impact of learning on inclination to recommend or prescribe as a result of visiting the exhibit.

Table 17

INCLINATION TO CONSIDER, PURCHASE, RECOMMEND AS A RESULT OF THE VISIT DEVICE 2010 vs. 2006-2007 n = 474 / 199		
Inclination	2010	2006-07
More	53%	41%
Less	3%	2%
Same	44%	42%

Source: ©Marketch, Inc. 2010, 2006-2007

This data clearly indicates that pharma exhibits at healthcare conventions continue to positively impact the buying, prescribing, or consideration behavior of nearly five of every 10 attendees who visited a specific exhibit. The new question then becomes how many non-prescribers were converted?

“customers” for both segments visit specific company booths, and that their inclination for continued inclusion of the exhibiting company’s products or services into their practices has been reinforced.

This data also suggests that a high level of current

Impact on Considering, Purchasing, Recommending – Device

When analyzing findings from 2006-2007 and 2010, results on the device side were even more positive. Findings from both studies are shown in Table 17.

More than five out of 10 (53%) were “more inclined” to consider, purchase, or recommend products after having visited a device exhibit at a healthcare convention. This is a significant increase over the 2006-2007 reported results.

Link Between Learning and Inclination

What is even more revealing from both of these studies in pharma and device is the direct link between learning something new or different and the inclination to take an action or recommend, prescribe, consider the offering after visiting the exhibit.

This link was demonstrated through a detailed crosstab analysis of data from our 2010 study. Findings are shown in Table 18.

Table 18

LINK BETWEEN LEARNING AND INCLINATION PHARMA & DEVICE n = 868 / n = 355						
Segment	More / Yes	More / No	Same / Yes	Same / No	Less / Yes	Less / No
Pharma	32%	7%	31%	29%	0%	0%
Device	38%	13%	23%	24%	1%	1%

Source: ©Marketech, Inc. 2010

This analysis tells us that when HCPs reported learning took place through the exhibit experience, the inclination to take a “more” positive action was higher than if no learning took place. For pharma exhibits where learning was reported, 32% of attendees were “more” inclined to recommend or prescribe and where learning took place in a device exhibit, 38% were “more” inclined recommend or buy.

These findings are significant and tell us that learning has to be the number one goal for all exhibitors as they plan their strategies and tactics for their exhibit performance in the future.

Learning has to be the number one goal for all exhibitors as they plan their exhibit strategies and tactics.

WHAT THIS MEANS FOR THE FUTURE OF HEALTHCARE EXHIBITION MARKETING

Our findings tell us:

- We can no longer depend on “happenstance” to have qualifiable visitors come to our exhibits.
 - Time is the competition for both you and your visitors. CEIR has reported that three-fourths of attendees come to a convention with agenda. You must be on their agenda to get a share of their time while visiting the medical convention expo.
 - You must start the conversation before they arrive at the meeting. You have to be on their “must see” list of exhibitors.
 - You need to understand how your prospective attendees want to be communicated with. Is it direct mail, email, social media, or direct communication via field sales reps?
- Every time you plan an event, you need to think in terms of how you are going to impact learning – learning that will result in greater inclination to recommend, prescribe, use, or buy. Today we have a variety of tools available to us to affect learning. These tools become the tactics you employ to address the strategies adopted in your planning.
 - Promotions – Use approved (PhRMA and AdvaMed, plus specific state regs) promotions that are meaningful, have high-perceived value, and promote learning.
 - Staff/Reps – Solicit customer-centric reps from the ranks of field sales and marketing. They need to address attendee needs, not your company’s products or services, and concentrate on meaningful discussions focused on those needs.

You must be on the visitor’s agenda to get a share of their time

- 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
- 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 by—learn what’s new, hear KOLs on topics of interest, see a demo of a new device. Or, get your field sales force to be an integral part of promoting the convention.
- The exhibit staff is the key ingredient to every exhibit. It is an opportunity to detail healthcare professionals in an entirely different environment, where you have the visitor’s attention and interest without office distractions and time limits. (Time is still both your and your attendee’s competition, since there are so many opportunities for involvement at a convention.) You also have the best-of-the-best show-and-tell materials on hand in this environment. Be sure the staff is well trained to deliver the best information to visitors in the best manner by being totally familiar with the exhibit and the exhibit elements.

The exhibit staff is the key ingredient to every exhibit, so be sure your staff is well trained to deliver your information to visitors in the best manner.

Be creative in transforming “known information” into something new.

- Teach technicians who use your medical equipment to mention the brand names to the patients. You’d be surprised how many patients this impresses. For example, “we use “Brand X” imaging equipment; we plan to install a “Brand Y” knee; our endoscopy equipment is made by “Brand C.” It indicates to patients that their providers buy the best.
- Don’t ignore non-physician attendees - people (even non-professionals) who attend these shows and come to specific booths are there to learn more about your company and products. Impress them. Viral marketing is alive and working—that means they’ll tell others.
- Focus on new buyers or prescribers. They may be your next high decile buyers if they can be converted.
- Remember that PAs, nurse practitioners and other healthcare providers who are recommenders and influencers are as important as physicians in today’s medical arena.
- 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.

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, and hospital bedding were studied at six different shows held during 2010. 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
- AAO
- ACC
- ASTRO
- SAWC
- SNM

Pharma

Seven large pharmaceutical companies were studied at 11 different shows held during 2010. Examples of medications manufactured are for (but not limited to) heart, diabetes, GERD, PNP, and ophthalmic use. 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
- ASH
- DDW
- IDSA
- ONS
- PMW



ABOUT MARKETECH360



The leader in exhibit and event performance improvement for more than 25 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.

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