


Doctor's Orders:

The Physician's Perspective
on Meetings and Events



The Evolving Medical Meetings Environment

Over the last twenty years, pharmaceutical companies have faced ever-changing guidelines and increasing scrutiny around their interactions with physicians. Interaction and communication with healthcare professionals is a critical channel pharmaceutical companies use to increase product awareness and receive product feedback. From the AMA and FDA guidelines issued in the 1990s, to the PhRMA code changes introduced in 2002, to the Sunshine Act in 2010, meetings held by pharmaceutical companies with physicians require significant planning, tracking and management to adhere to compliance rules.

The global growth and international expansion of pharmaceutical companies has also added complexity as local regulations must also be understood and met. For example, in the United States, the Foreign Corrupt Practices Act (FCPA) has created additional levels of scrutiny and is driving a need for incremental training within organizations to help ensure appropriate contact, management and reporting when dealing with foreign officials and organizations. Special attention is also required when working with government

employees. Continuing growth of nationalized healthcare in countries across the globe means physicians can be considered government employees, increasing the sensitivity to interactions and transfers of value (TOV) between organizations and physicians.

With so much attention being paid to addressing medical meeting guidelines and regulations, it is important to ensure the needs of the meeting attendees are also being met. Attracting physicians and designing effective, compelling meeting experiences is critical to the ongoing success of pharmaceutical-sponsored meetings. This study looks at medical meetings from the standpoint of the physician attendees to better understand the elements of these meetings that attract them today, and what will motivate them to attend in the future. Understanding physician preferences can create a competitive advantage for pharmaceutical organizations in their ongoing use of the healthcare provider channel as a main channel for product education, awareness and feedback.



Methodology

To better understand the perspective of physicians regarding meeting and events preferences, common practices and increasing regulatory requirements, American Express Meetings & Events conducted a global survey of 505 physicians. The survey was completed by physicians in numerous countries, including: Australia, Brazil, China, Hong Kong, Italy, Germany, France, U.S.A., U.K., and Mexico. The regional distribution of respondents is detailed in Table 1.

To qualify to complete the survey, individuals were required to be physicians in a practice area that would be expected to regularly interact with pharmaceutical and medical device firms (e.g., radiologists were excluded from the survey). Respondents were also required to have attended at least one medical meeting in the past 12 months. Physicians representing a wide range of specialties were invited to participate in the survey. The completed surveys ultimately represent the perspectives of 294 primary care physicians (referred to as “generalists” in this study) and 211 specialists (e.g., Obstetrics/Gynecology, Cardiology, Psychiatry, etc.).

Physicians completing the survey also represent a variety of practice organizations. Most respondents practice medicine in hospitals/clinics or individual/small-group practices, but large-group practices and university/medical school practitioners are represented as well. Specific counts are shown in Table 2.

Additionally, the study was designed to be representative of physicians of all ages and genders (Table 3 & 4).

Respondents by Region



REGION	COMPLETED SURVEYS
North America	149
South America	51
Europe	109
Australia	93
Asia	103

Table 1: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Respondents by Organization

PRACTICE ORGANIZATION	COMPLETED SURVEYS
Hospital or clinic	285
Large-group practice	57
Individual or small-group practice	142
University or medical school	21

Table 2: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Respondents by Age and Gender

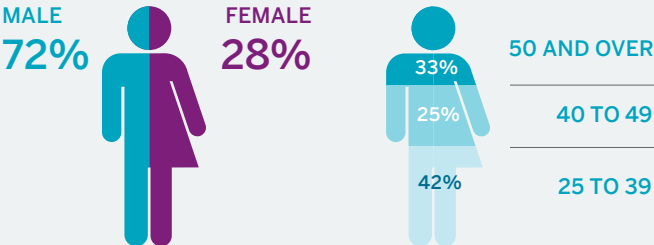


Table 3 & 4: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Most Frequently Invited by

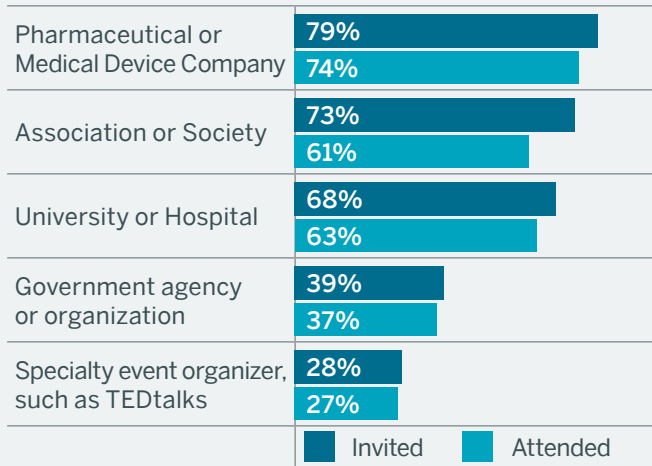


Table 5: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Most Frequently Attended

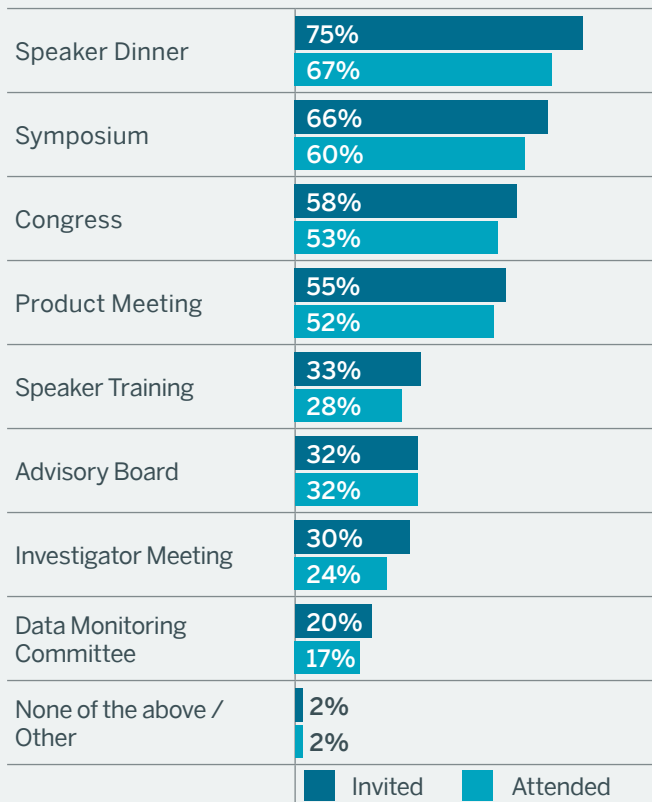


Table 6: Source "American Express Meetings & Events HCP Meeting Study April 2016"

STUDY FINDINGS

No Shortage of Invitations

According to respondents, physicians are invited to and attend a considerable number of meetings each year. On average, physicians surveyed received invitations to 16 meetings in 2015 and attended 8 meetings, 5 of which were hosted by a pharmaceutical or medical device company. Physicians are most frequently invited to meetings by pharmaceutical and medical device companies, but associations or societies and universities and hospitals also often invite physicians to meetings (Table 5).

PHYSICIANS ATTEND AN AVERAGE OF 8 MEETINGS PER YEAR

Fifty-four percent of these physicians attended at least one meeting in 2015 as a speaker; 38% spoke at a pharma or medical-device meeting. Physicians speaking at these meetings were speakers at an average of 3.5 industry meetings and 3.2 pharma meetings.

Physicians most frequently attend speaker dinners, followed by symposia, congresses, and product meetings – more than half of physicians attended these types of meetings in 2015. The top four meeting types most frequently attended were consistent on a global basis. However in Asia, symposia and congresses ranked ahead of speaker dinners and product meetings (Table 6).

Preferred Sources of Learning

Physicians have a myriad of resources at their disposal to learn about new research, treatments, and indications. When offered a list of 14 sources of new information, meetings account for half of the six most-preferred sources— a clear indication of the vital role meetings play for practitioners.

Preferred sources of new information seem to evolve with age and experience. Younger physicians (under the age of 40) tend to prefer referring to clinical practice guidelines and medical textbooks to a greater degree than their more experienced counterparts, who prefer association congresses and pharmaceutical meetings (Table 7).

MEDICAL MEETINGS ARE A PRIMARY SOURCE OF CONTINUING EDUCATION FOR PHYSICIANS.

Most Preferred Resources

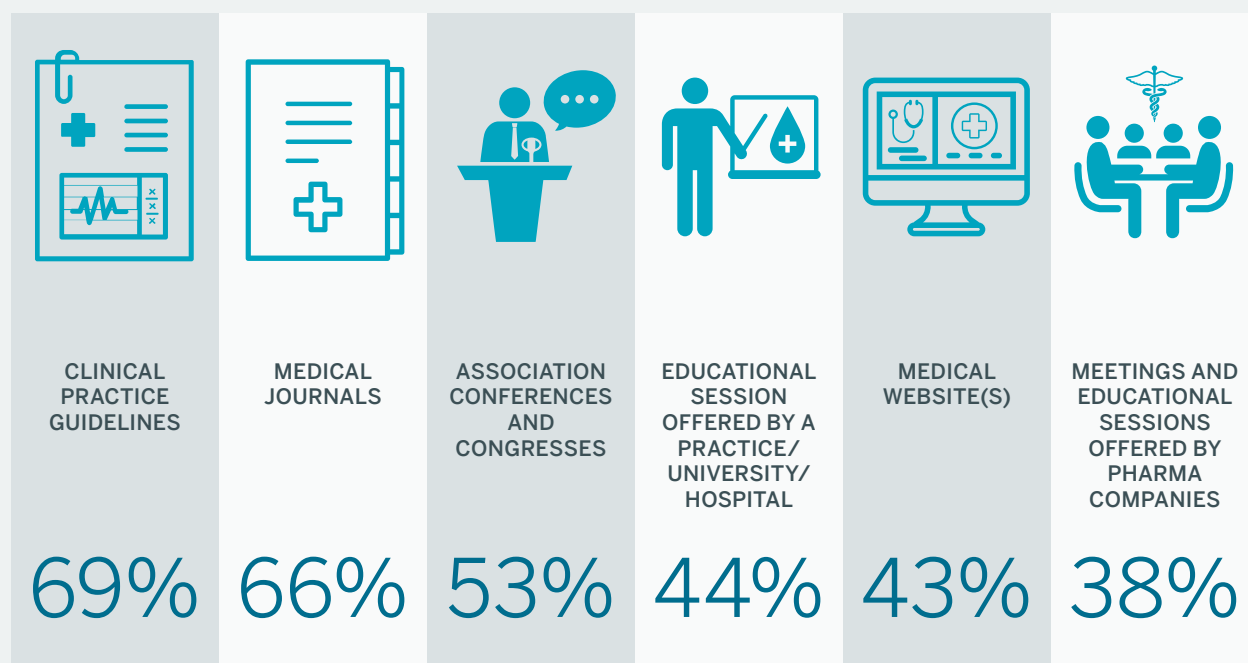


Table 7: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Expectations and Benefits

Increase Interactivity

By their own assessment, physicians receive numerous benefits by attending medical meetings, the most important of which is accessing information, such as clinical trial results that will help their practice, a benefit noted by three-quarters of the survey respondents. With the exception of sharing research/experience with others, the remaining benefits are seen as similarly important advantages of these meetings, as depicted (Table 8).

Pharmaceutical companies who focus on creating networking opportunities will have a distinct advantage in attracting physicians given their desire to network with peers and experts is a key driver.

Physicians also have clear preferences for the design of medical meetings, strongly preferring workshops and breakout sessions to panel, single speaker, and audience response formats. This is particularly so for younger physicians with 54% reporting they prefer workshops to other designs, compared to 37% of physicians over 40 (Table 9).

Delivering on Expectations

As noted earlier, physicians most often attend meetings hosted by pharma or medical device companies, but when asked to rate meeting organizers in terms of delivering the promised learning or content, only two-thirds of physicians say these firms are

Benefits of Attending Meetings

Gathering information that will benefit my practice	74%
Networking with my peers	68%
Gathering information that will benefit my patients	67%
Networking with experts in my field	66%
Earning Continuing Medical Education credits	64%
Sharing my research/experience with others in my field	39%

Table 8: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Preferred Meeting Formats

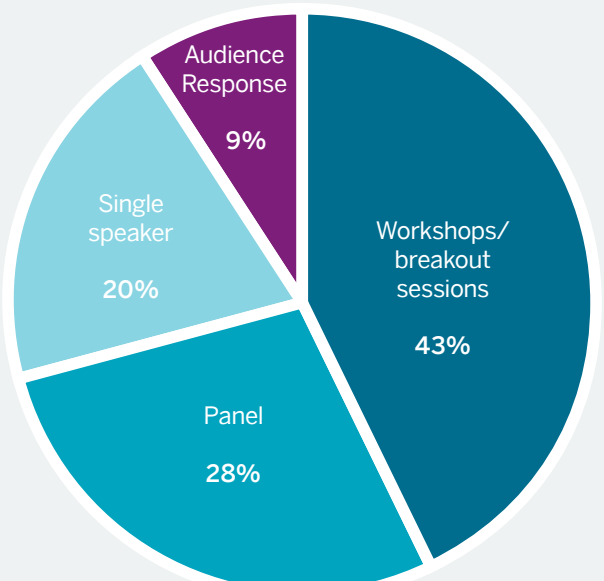


Table 9: Source "American Express Meetings & Events HCP Meeting Study April 2016"

doing very or extremely well in that regard. Associations, societies, universities and hospitals are seen as superior to other meeting organizers when it comes to delivering against expected learnings – indicating an improvement priority for pharmaceutical and medical device companies (Table 10).

Meeting owners and planners have opportunity to improve both design and execution to better meet the needs and expectations of physicians. Pharmaceutical companies may have an opportunity to distinguish themselves in the crowded marketplace and thus more easily attract their desired audience if they are able to improve the delivery of the promised meeting experience.

Attendance Challenges Differ by Age

Taking time away from their practice and families are the biggest challenges physicians associate with attending medical meetings. Cost and the travel itself are other issues physicians relate with these meetings. Interestingly, younger physicians find arranging travel to be more of a challenge than older physicians do – 39% of practitioners under 40 cite arranging travel as one of the challenges compared to only 29% of physicians 40 and older. This could be due to those over 40 simply having more familiarity with the process, or having assistants to help make those arrangements (Table 11).

Meetings Deliver Expected Learnings

Association or Society	77%
University or Hospital	74%
Pharmaceutical or Medical Device Company	66%
Specialty event organizer, such as TEDtalks	58%
Government agency or organization	47%

Table 10: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Challenges for Attending Meetings

Taking time away from my practice	58%
Taking time away from my family	50%
Cost of attending	43%
Traveling to/from the meeting	43%
Finding content that is relevant to my practice	36%
Making the arrangements - registration, hotel, travel	33%
Connecting with peers/experts in a meaningful way	24%
Managing the reporting/compliance requirements	19%

Table 11: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Consideration for Attending Meetings

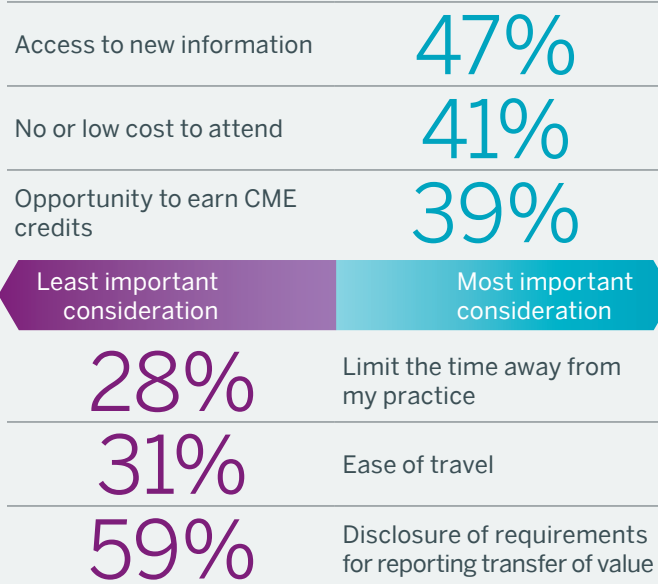


Table 12: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Most Important Improvements for Meetings

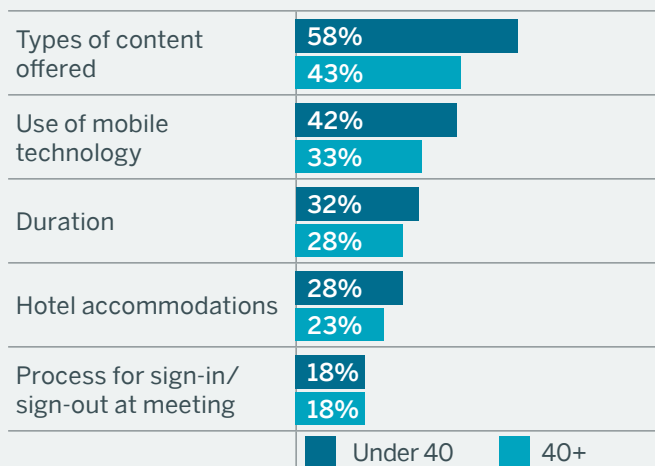


Table 13: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Prioritizing Mobile Technology by Age

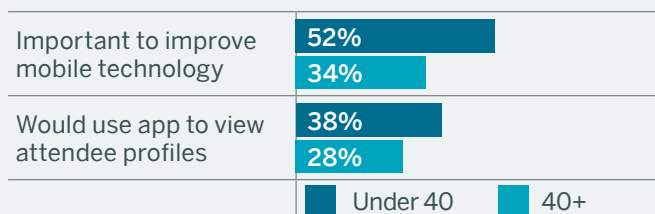


Table 14: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Content is King

Physicians are, on average, invited to twice as many meetings as they attend. It is important to understand how physicians consider and select the meetings they attend. Physicians cite content for two of the top three most important considerations when deciding whether to attend a meeting – access to new information and the opportunity to earn CME credits. The remaining top consideration is the cost of the meeting. Despite the pulls on their time, physicians consider limiting the time away from their practice or ease of travel to be among the least important considerations. Compliance with regulations requiring disclosure of transfer of value is of least consequence to physicians when deciding to attend a meeting (Table 12).

While physicians consider content to be a critical factor when deciding to attend a meeting, they also select this as the most important element meeting organizers should work to improve. Presentation format, use of mobile technology, and opportunities to connect with other attendees are other areas physicians feel could be enhanced. Not surprisingly, younger physicians place more emphasis on improving mobile technology than their counterparts do (Table 13).

IMPROVED USE OF MOBILE WAS PRIORITIZED BY 52% OF YOUNGER RESPONDENTS COMPARED TO 34% OF OLDER RESPONDENTS.

This reinforces the importance of leveraging technology to attract younger attendees now and continue to attract future generations (Table 14).

Hot Topic – Mobile Apps

MOBILE APPS REPRESENT AN OPPORTUNITY TO CREATE DIFFERENTIATION AND IMPROVE EXPERIENCE. GIVEN THE PROLIFERATION OF MOBILE APPS IN ALL OTHER ASPECTS OF PHYSICIANS' LIVES - BOTH PERSONAL AND AS A PATIENT TOOL - MEDICAL MEETING OWNERS SHOULD EXPLORE IMPROVING THE USE OF MOBILE MEETING APPS.

Physicians see a great deal of utility in a mobile app for a specific meeting, and would be interested in using an app for a variety of purposes. The majority of doctors would expect to use an app to access meeting content and meeting information. Approximately half would use an app to check in and out of a meeting or track attendance at sessions and events. Less common uses would be messaging other attendees or speakers, and capturing receipts for travel and expense management (Table 15).

Mobile technology capabilities are particularly important to younger physicians, who likely have technology integrated into most aspects of their lives. Doctors under the age of 40 place a higher priority on meeting organizers working to improve the mobile technology for their meetings, and are also more likely to use a mobile app to connect with other meeting attendees (Table 14).

Uses for Mobile Apps

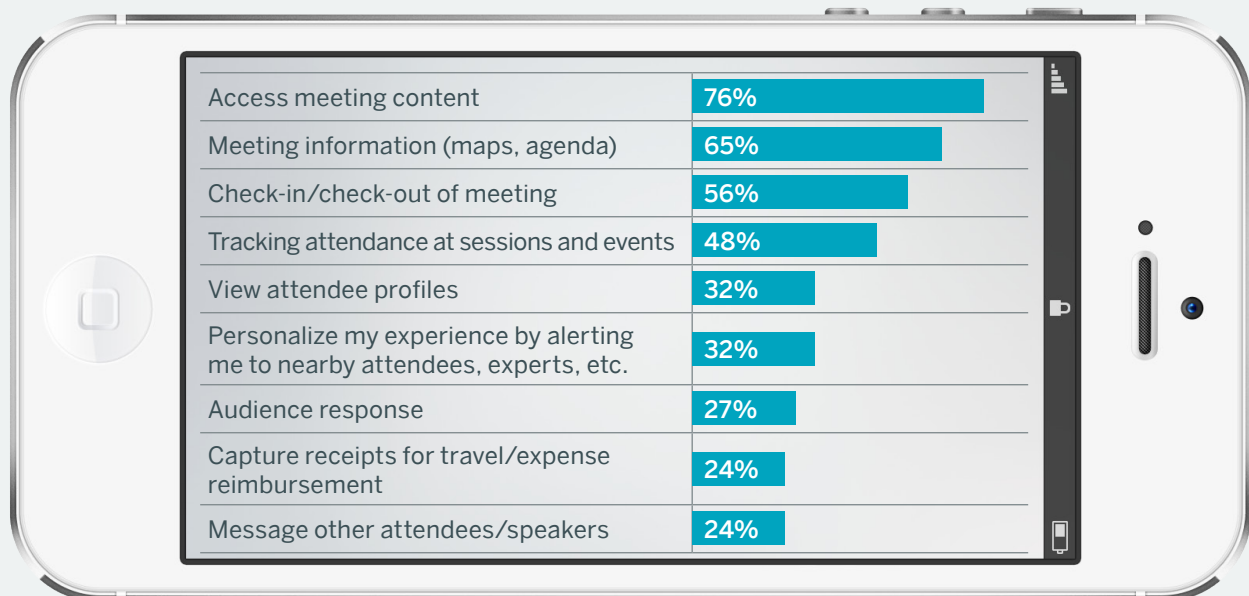


Table 15: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Transfer of Value – Physician’s Largely Unconcerned

As noted earlier, physicians seem largely unconcerned with the requirements for reporting transfer of value (TOV) associated with medical meetings. Only 19% of physicians identify TOV requirements as a challenge associated with attending meetings. Only 1% of respondents indicated TOV as an important consideration when deciding to attend – 59% declare it among the least important considerations.

Almost 60% of physicians have never visited a TOV reporting database and 25% have only reviewed that data once or twice. Three quarters of the physicians surveyed have never disputed a transfer of value entry. All of these findings reinforce the lack of awareness and concern among physicians regarding the TOV disclosure requirements.

That is not to say physicians are completely indifferent to the issue. More than half of physicians (56%) agree it would be beneficial to them to be informed of the value associated with a meeting when invited to attend. This is particularly true for younger physicians; 63% of practitioners under 40 would find upfront notice of the value to be reported helpful, compared to 52% of physicians 40 and over.

Awareness of, and adherence to, TOV limits is a major focus for pharmaceutical companies and often a driver of the meeting design and experience. The dynamic of low awareness or concern on the part of the physician attendee creates an interesting challenge for pharmaceutical companies as they must balance meeting TOV requirements with the expectations of physician attendees who are not necessarily concerned with TOV limitations.



Regional Differences

Similarities and differences are evident in the meetings most frequently attended by physicians in different regions of the world. Speaker dinners are the primary meeting type attended in North and South America and Australia. Congresses and conferences are heavily attended in South America, Europe, and Asia. Symposia and product meetings are moderately attended across all regions (Table 16).



Most Attended Meetings by Region

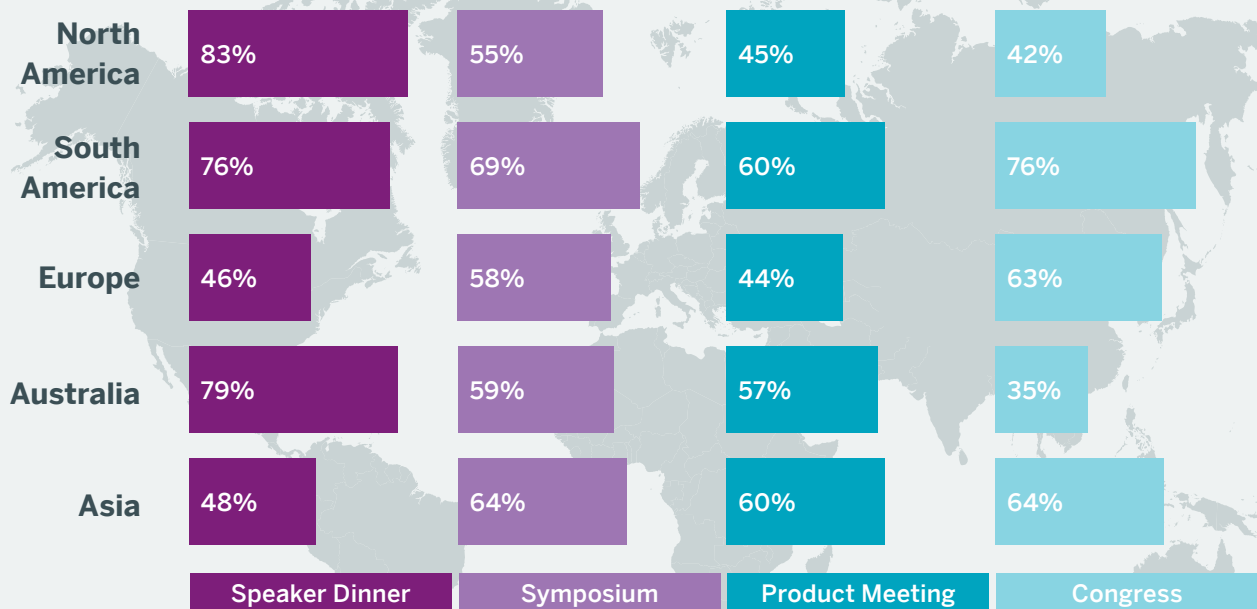


Table 16: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Benefits of Attending Meetings – China vs. Global Average

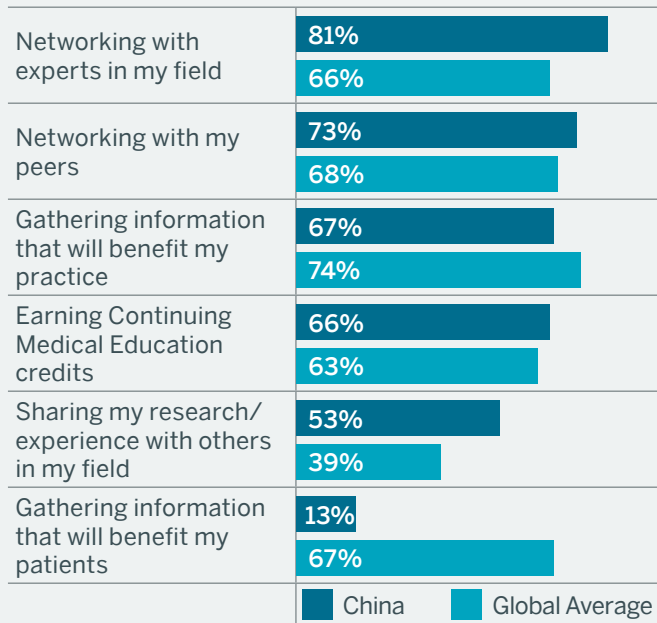


Table 17: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Challenges of Attending Meetings – China vs. Global Average

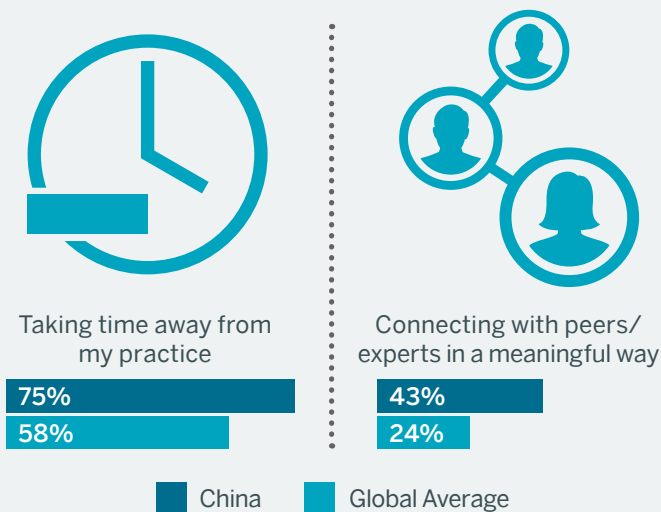


Table 18: Source "American Express Meetings & Events HCP Meeting Study April 2016"

Medical Meetings in China

With over 2 million practitioners and a population nearing 1.5 billion people, China continues to be a country of great interest for pharmaceutical and medical device firms. China also continues to be a leading area of risk related to meetings and events activity. Many pharmaceutical companies have encountered meetings-related fraud in China and are actively working to minimize their exposure. Conducting successful medical meetings in China requires an understanding of the specific preferences and concerns of physicians in that country.

Doctors in China appear to be much less concerned with gathering information that will benefit their patients than doctors in other regions – instead they prioritize networking and opportunities to share their research and experience with their peers (Table 17).

NETWORKING AND OPPORTUNITIES TO SHARE WITH PEERS IS A PRIMARY DRIVER OF MEETINGS ATTENDANCE FOR PHYSICIANS IN CHINA.

Physicians from China indicated much more concern than their global counterparts about taking time away from their practices. They also highly prioritize connecting with their peers at medical meetings. This is evident in the emphasis they place on networking at these meetings, indicating potential challenges in making connections with peers/experts in a meaningful way (Table 18).

More than in other regions, when considering which meetings to attend physicians in China indicated they prioritize opportunities to connect with peers/experts and the ability to attend smaller, more personal meetings. They also have a stronger preference for workshops with breakout sessions – likely related to their desire to connect with peers and experts (Table 19 & 20).

Finally, respondents from China place high value on technology use– envisioning a mobile app that allows them to track attendance at sessions and events, as well as access meeting content. And in keeping with their wish to connect with their colleagues at these meetings, physicians from China indicate they would find considerable value in an app that allows them to view attendee profiles to support networking efforts (Table 21).

Considerations Important to Attending Meetings – China vs. Global Average

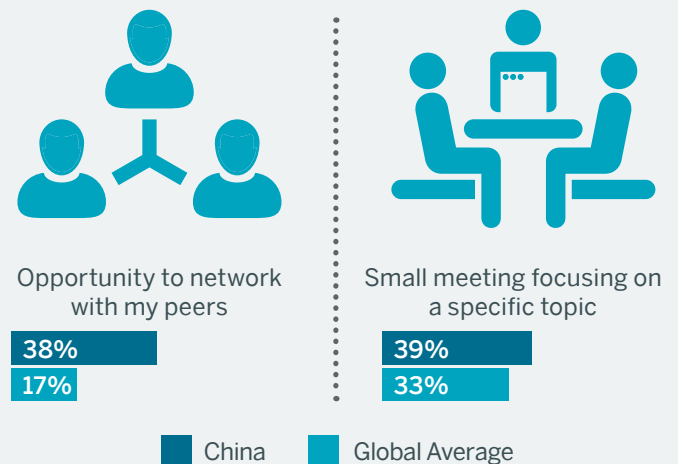


Table 19: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Preferred Meeting Formats – China vs. Global Average

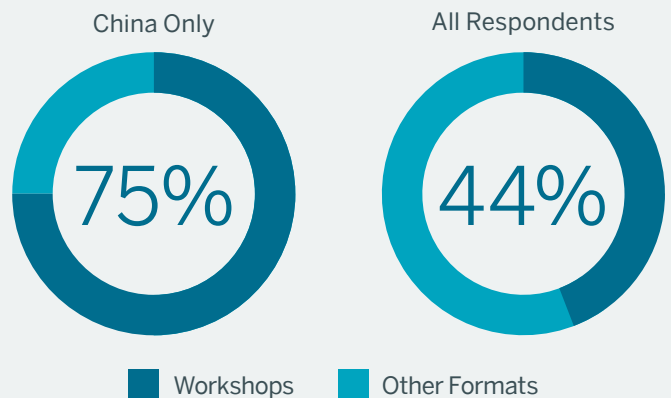


Table 20: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Uses for Meetings Mobile App – China vs. Global Average

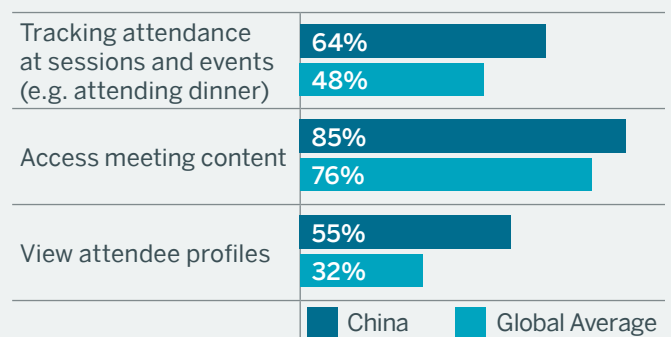


Table 21: Source “American Express Meetings & Events HCP Meeting Study April 2016”

Designing Meetings for the Future

This study points to key focus areas that pharmaceutical companies should focus on as they look to continue to create meeting experiences that will attract, and resonate with, physicians across the globe. Content is the most critical element to attracting and retaining physician attendees.

But organizations must go beyond creating compelling agendas, to focus on delivering on the promised content experience to truly stand out. Study respondents have indicated this is a substantial area of opportunity for many of the meetings they attend today.

Increased use of mobile apps to access meeting content, provide tracking of meeting and session attendance, and even help facilitate networking among attendees represents another area of potential improvement. While all respondents find mobile apps of interest, the desire to incorporate them into medical meetings is strongest among physicians under 40 years of age.

Finally, medical meeting owners should consider regional differences when planning meetings to help deliver the most appealing and effective experiences. While networking tops the list of objectives in China, access to new information is a bigger driver of attendance in other areas. Pharmaceutical and medical companies should design meeting agendas with attendees from that region in mind.

Medical meetings play a strong role in continuing education for physicians, and in the awareness and education programs for pharmaceutical organizations. While the compliance environment and regulations require continued attention, it is important for medical meeting owners to maintain focus on designing and living into the promise of each meeting to continue to attract physicians to their meetings and events.

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MEETINGS & EVENTS

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