

Navigating the New World of Virtual Conferences

The Example of ASCO 2021



Introduction

Medical science conferences like the American Society of Clinical Oncology (ASCO), American Society of Hematology (ASH), and European Society for Medical Oncology (ESMO) play an important role in disseminating clinical and scientific information to physicians, researchers, industry and public audiences such as patient advocates and investors. They provide a forum for peer-to-peer interactions, as well as across different stakeholder groups, such as manufacturers and physicians, and researchers and patient advocates.

COVID-19 has disrupted medical conferences as it has almost everything else. In-person meetings have been limited or canceled and travel has been limited. These conferences have had to move online, and for the past two years, the experience was purely virtual, including academic presentations, and interactions between manufacturers and physicians. This first generation of virtual medical science conferences were essentially digital versions of the in-person events, with oral presentations, poster presentations, virtual exhibition floors and manufacturer displays mimicking the physical appearance of exhibition booths.

While people were expecting to return to in-person conferences soon, the emergence of the Delta variant and the possibility of future unknown variants, combined with uneven vaccination rates, has created significant uncertainty about how soon that can happen. Trinity Life Sciences wanted to understand what perceptions medical conference attendees had of the new virtual conference world, what advantages and disadvantages they saw in it, and how manufacturers performed at engaging their audiences. We performed a post-conference survey of 100 U.S. oncologists about their experiences at the ASCO 2021 Virtual Conference. The goal is to understand what might make virtual conference participation an easier and more beneficial experience, so manufacturers can use the learnings and re-design their go-to conference strategy and plan budget allocation accordingly, in preparation for future conferences such as ASH 2021 and ASCO 2022.

Three Key Themes Emerged

- 1 Virtual ASCO got mixed reviews**
- 2 Top performing manufacturers at conferences**
- 3 The hybrid future for conferences**

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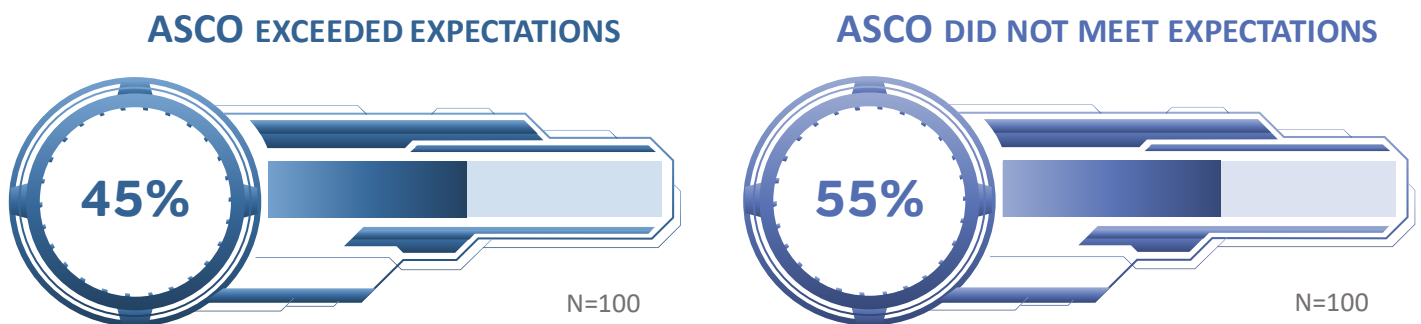
Virtual ASCO got mixed reviews

Overall, surveyed attendees' experience was mixed, with 45 percent feeling that ASCO exceeded their expectations, while 55 percent felt it did not meet expectations (Figure 1).

On the positive side, they felt that the conference managed to present exciting data and content, and that remote attendance was convenient. Treatment of prevalent tumors (e.g., lung cancer, breast cancer, multiple myeloma, etc.) and immunotherapy continue to dominate the list of tracks HCPs find most interesting at ASCO.

One of the main drawbacks noted was the lack of impromptu in-person networking opportunities. Conferences are often the only place oncologists can meet and build relationships with peers. Back-and-forth discussion and debate on different treatment approaches or promising research directions can be stimulated by a presentation or a poster session. Moderator-controlled chat boxes lose much of that dialogue. Some felt the technology platform was not as intuitive, and there were difficulties with navigating between different online events.

Figure 1. Experience of attending ASCO 2021 virtually



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Top performing manufacturers at conferences

Similar to the pre-pandemic era, incumbency has proved to be a strong advantage, as has the quality of data presented. In ASCO 2021, the plurality of respondents felt that Merck had “won” ASCO, at 24%, with BMS/Celgene coming in second at 18%, and Genentech/Roche third at 12% (Figure 2).

Figure 2. Companies that won ASCO 2021



N=100

Building positive perceptions in the healthcare provider’s mind takes time, but if done correctly, the ‘halo’ effect of perceptions can last a long time. Before the introduction of immunotherapy, Genentech/Roche led the Oncology space through targeted monoclonal antibodies. Merck’s introduction of Keytruda and BMS/Celgene’s of Opdivo and Yervoy disrupted this dominance. However, Genentech/Roche still showed itself a strong contender at ASCO 2021 by presenting more abstracts and was ranked first on data presented and the relevance of their data to practice (Figure 3).

Figure 3. Top five performers across key metrics

	#1	#2	#3	#4	#5
Overall presence & engagement		 <small>A Member of the Roche Group</small>	 <small>INVENTING FOR LIFE</small>	 	
Amount & quality of data presented	 <small>A Member of the Roche Group</small>	 		 <small>INVENTING FOR LIFE</small>	
Relevance of data to practice	 <small>A Member of the Roche Group</small>	 <small>INVENTING FOR LIFE</small>	 		
Extent of contribution to Oncology	 		 <small>A Member of the Roche Group</small>	 <small>INVENTING FOR LIFE</small>	

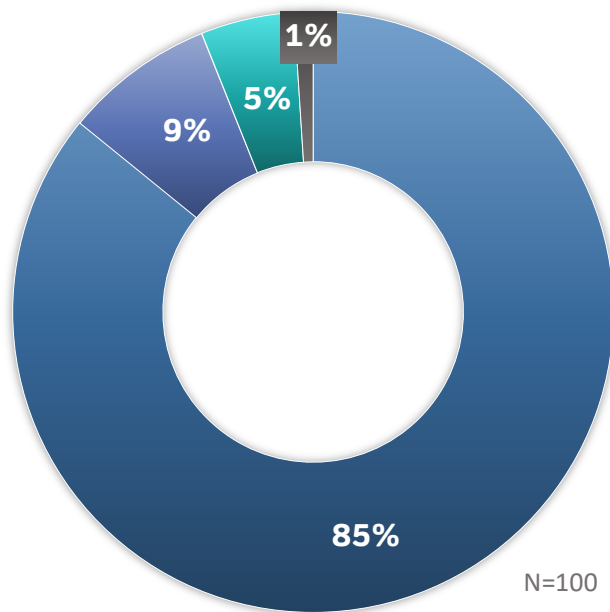
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The hybrid future for conferences

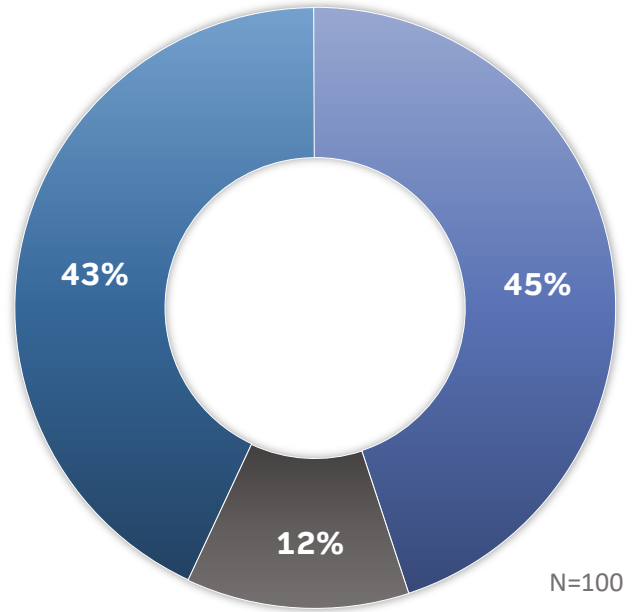
Almost all oncologists, 85 percent, attended at least one conference virtually during the COVID-19 pandemic, and only 9 percent attended in person (Figure 4). Looking ahead, only 43 percent of them intend to continue attending conferences virtually during the rest of 2021, while 45 percent said they would attend in person (Figure 5).

Figure 4. 2021 conference participation



■ Virtually ■ Some Virtually, Some In-Person
■ In-Person ■ Did not attend any conferences

Figure 5. Future conference participation



■ Virtually ■ In-Person
■ Will not attend any conferences

One possible advantage of virtual conferences could be minimizing costs and time for travel, particularly in an environment of new variants and changing travel and quarantine restrictions. These lowered barriers can lead to a more diverse attendee list, with more attendance from early-career researchers, physicians, and researchers from institutions with limited funding. Younger physicians and researchers could be just as comfortable navigating virtual conferences, as they would in-person, hence might even prefer virtual events moving forward.

Conclusion

ASCO's reputation as the go-to place for top-quality data and the most recent advances in oncology continues to be the main driver of attendance. In the future, however, such conferences will need to innovate to maintain value and relevance, for example in improving the flexibility and usefulness of virtual peer-to-peer interactions.

To be effective, that virtual environment will need to be designed from the ground up, rather than be based on a physical convention center. Immersion, superior editing, and greater interactivity will need to face the shorter attention spans characteristic of virtual interaction. Accomplishing this will take more resources, time, and effort than is generally appreciated. Constant reevaluation of effectiveness will be necessary.

Virtual booths are a good example of this. Once they lose their connection to a physical booth in a specific location on the exhibition floor, they become experiences. How do you attract attention, particularly attention from those you most want to reach? How do you effectively convey your message, and interact intuitively with your target audience? How do you maintain interest and focus?

The future world in general, and large conferences in particular, will most likely be a hybrid one, with a significant in-person conferences combined with a virtual engagement platform. Virtual conferences have shown some advantages, such as the improved attendance of HCPs worldwide and presentations with a greater multimedia component, and these are likely to be retained even after in-person conferences become possible again.

This will be more expensive and complex to manage since each booth will have a physical and a virtual component. Manufacturers will also need to give serious thought to how to address oncologists with varying familiarity and comfort with virtual interactions. Physician engagement strategies may need to segment their audiences depending on how easily they can absorb information in a virtual environment. Anyone presenting or displaying at a conference will need to ensure overall presence and visibility, with more complex calculations of return-on-investment.

Efforts will need to be made to ensure that virtual participants feel fully involved and visible, even as in-person attendees more freely interact with their peers. Both conferences and exhibitors have the opportunity to transform their approach to attract and reach their target audiences. While amount and quality of data continues to primarily drive positive manufacturers perceptions pre- and post-pandemic, the new 'hybrid' platform will provide a more level playing field for smaller companies or start-ups to have attractive booths and creatively engage their audiences.

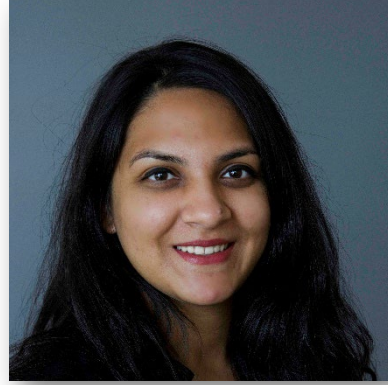
Next Steps

Trinity Life Sciences will continue to track this space, including the upcoming American Society of Hematology (ASH) conference and will report whether these trends evolve as experience with virtual conferences continues to grow.

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