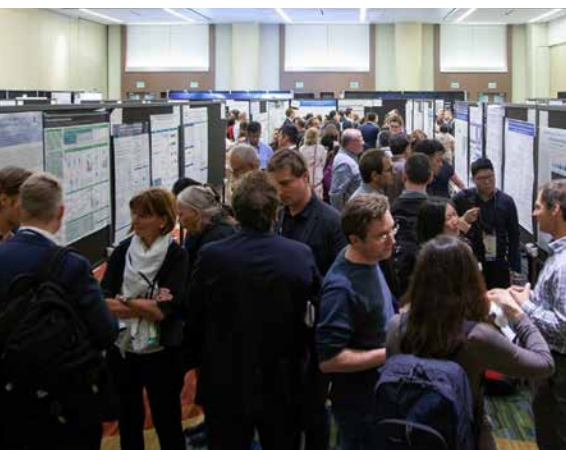


Print Posters vs ePosters at Congresses

The print poster is not dead yet

A Look at the Medical market in Europe

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1 THE QUESTIONS BEING ASKED

Over the past decade or so, there has been a significant trend towards the development and introduction of ePosters at congresses, particularly medical ones. It started around 2005 with posters on CD-ROMs. This then prompted fierce discussion among journal publishers/editors about how such 'prior-publication' would affect authors if they then wanted to publish the same or some of the content as a journal article.

Those days are long gone. The discussion about prior publication has trickled to almost nothing, and publishers have embraced the concept of more immediate publishing via the internet, as well as open-access publishing¹. The demise of the CD was a consequence of the huge advantages and power of the internet as well as new rules on compliance preventing direct commercial involvement with the science of a meeting. In particular EFPIA and MedTech Europe, the two main industry bodies representing respectively the pharma and medical device industry, laid out the (sometimes strict) guidelines for sponsorship and this dramatically changed the business model for associations and industry. The rules are beyond the scope of this paper but are naturally available from the respective representative bodies.

The problem, or better said, the dilemma, still remains. Are ePosters a better alternative to print posters and, if so, how will that change the landscape and business model of congresses. This paper does not set out to definitively suggest what works best, because the jury is still out on that count. For the first time, it does however take a close look at the European and International medical congress market with a view to providing quantitative research into ePosters and print posters. This information can be used to supplement the ongoing dialogue among meeting organisers about the relative benefits of the two options.

About the author

Keith Foley has been involved in scientific publishing (Elsevier) and the meetings business for his whole career. For much of this time he was responsible for Marathon International in Europe, one of the first companies to offer digital abstract management and ePosters, with a large emphasis on the medical market.

He is now working independently, but works primarily advising CTI Meeting Technology based in Vienna and Chicago.
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¹ Open access (OA) is a mechanism by which research outputs are distributed online (generally via scientific journals), free of cost or other barriers, and, in its most precise meaning, with the addition of an open license applied to promote re-use.

2 THE RESEARCH - DESIGN

The purpose of the exercise was to look more deeply at what is currently being done at the larger medical meetings in Europe based on actual numbers from meetings held in 2018. A medical meeting is defined as one with primarily a clinical objective, and excludes subjects like veterinary and basic research (for example, meetings on cell biology are not included).

The research does not make an effort to statistically look at the trends over the last few years, as this was a bridge too far for the respondents who did not have the information readily to hand. We did ask questions about respondent opinions on trends, and where appropriate these are answered in qualitative terms.

For the purposes of the research, we also included the larger international meetings as they also rotate frequently into Europe and represent an important part of the medical meeting landscape.

There were two main targets. To reach a representative quantity of at least 75,000 posters and a minimum of 75 meetings/associations. At a best guess, this is 50% of the estimated total in Europe and qualifies as a representative amount. All target meetings were abstract driven (and therefore posters) association meetings and not commercial meetings or conferences funded by third parties. An association is either a member driven organisation or a federation of member societies.

In order to ensure optimum response, the number of questions was limited to seven, and designed to be not too demanding. In short, the essence of the questions was to establish:

- a In general, how many posters each meeting accepted for presentation
- b Of these, how many were print posters and how many ePosters
- c To determine the extent that these were hybrid presentations (a hybrid poster presentation is when a combination of both print and ePosters is offered)
- d How many were posted online after the meeting
- e Any anecdotal comment about the trends and/or how the respondents view the acceptance of ePosters

No attempt was made to see how these ePosters were displayed onsite and whether or not they were part of poster clusters or posters for discussion.

For the purposes of the results, the congresses were classified into Tier 1 and Tier 2 meetings. For the purposes of our definition, Tier 1 meetings are classified as those with >1500 posters and/or are regarded as the leading meeting in their therapy area. The Tier 2 meetings are those remaining with a minimum of 250 posters. There was no attempt made to research meetings with less than 250 posters.

The design did not attempt to ask questions about the relative costs of print and ePosters.

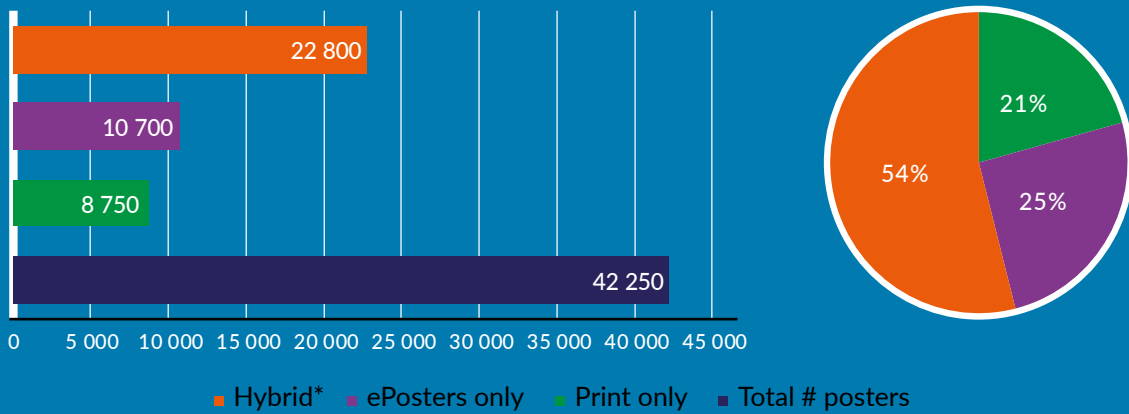
3 THE RESEARCH - RESULTS

The research took place in late 2018, and early 2019 and the figures represent data from meetings held in 2018.

The original target of 75,000 posters was exceeded and the final tally of posters came in at 104,200.

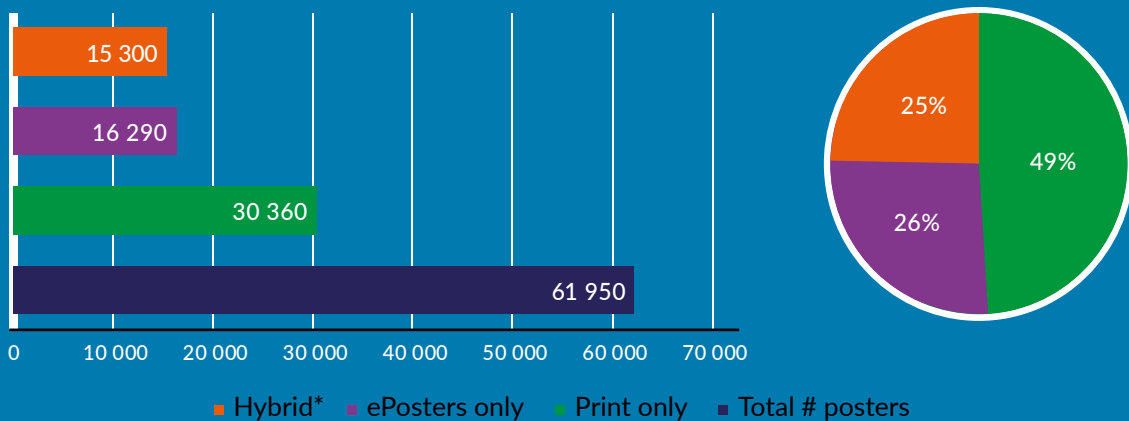


FIGURE 1 **TIER 1 POSTERS**



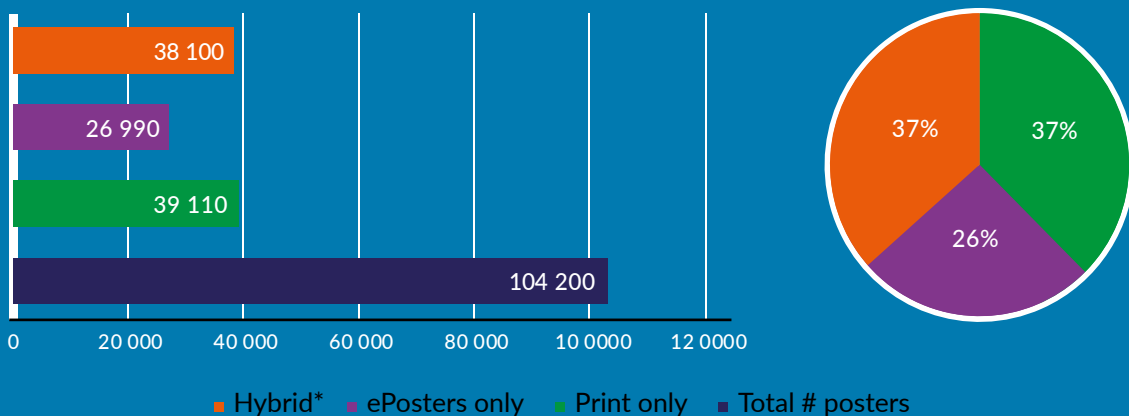
In other words, 75% of the total are still print posters. 79% are ePosters.

FIGURE 2 **TIER 2 POSTERS**



In other words, 74% of the total are still print posters. 51% are ePosters.

FIGURE 3 **ALL POSTERS**



In other words, 74% of the total are still print posters. 63% are ePosters

* A hybrid is when both print and ePosters are offered

This number was generated by 98 meetings, which means there was an average of about 1,050 posters per meeting. Of these meetings, 22 were classified as Tier 1 meetings.

The actual results are presented below in chart form, first the breakdown by actual numbers of posters, and then more interestingly the percentage representation for each category. Observations on each follow.

3.1 Tier 1 Posters

The results offer a clear picture of the current (2018) status. Although the figures do not provide any change in trends over the years, it is very apparent that at least the Tier 1 meetings/associations have adopted ePosters as a significant part of their scientific programme. However, this has not been at the expense of the print posters. If you add the 10,700 eposters to the 22,800 hybrid, this represents 79% of the total number of posters that are now offered as ePosters. And this obviously has budget consequences.

While print is still strongly favoured and absolutely not abandoned, it is particularly interesting to note that two of the Tier 1 meetings that originally transitioned to only ePosters have reversed their decision and now offer the hybrid solution. They experienced too much resistance from the participants and respective boards, a recurring subject which we will return to later in the paper.

Fourteen of the Tier 1 societies (67%) place their posters online after the meeting, which is additional recognition of the value of having a digital poster resource for post-meeting use. Anecdotally, there are still mixed opinions about the merits of online posters, whether or not the quality is good enough, prior-publication issues and membership strategies. If it is done, it is always behind a login, which is generally only available to members and/or participants, but little is done in the way of community building and discussion around the posters.

3.2 Tier 2 Posters

There is clearly a significant difference in the balance between print and ePosters within these two categories. As expected, the Tier 2 meetings are generally smaller and do not have the same budgets as the

Tier 1 meetings, hence the big difference. However, if you look at the total number of print posters, the two categories are as good as identical with about 75% still being print. The number of ePosters is considerably less, but they still represent a large portion of the growing market.

There were very few societies in the category that responded to the question about online usage, but it is probably safe to say that, unlike the Tier 1 meetings, there is little enthusiasm for the post-meeting archive aspects. It may be dangerous to suggest this, but it could be that some of the smaller meetings are less happy about the quality of some of their posters. Budget issues will also play a role.

3.3 Total Posters

The figures for total posters are naturally a sum of the Tier 1 and Tier 2 categories, so the charts above give a complete picture of the current status in the markets we defined. It is quite clear that print is still the dominant choice, but there is no doubt that ePosters have established a niche, primarily as a hybrid offering. In both of the categories, the percentage of print posters was essentially the same.

3.4 Anecdotal and other comments

During the course of the research, we also sought to obtain comments on opinions, trends, and any anecdotal information that will be useful to the research. Not unexpectedly, respondents were more focused on the numbers than providing additional information, but by phone and email, the opinions can be best summarised as follows:

- Most importantly, print posters provide the best platform for large scale and intimate interaction between authors and participants. "You cannot talk to a computer".
- Print posters are often on the fringes of the exhibition.
- Print offers easier browsing.
- Poster authors feel they have more exposure by way of print because it is more visible and important to a career path. Posters are often re-posted at their institute.
- The costs of ePosters should not be underestimated; primarily the hardware for the terminals and budget is a major issue for many meetings.
- ePosters offer much better targeted searching.



- Set up optimally, ePosters can offer better circumstances for poster discussion sessions.
- If placed online after the meeting, ePosters can provide continuation of the meeting beyond the congress dates, and for non-attending members.
- There are strong and diverse opinions within the scientific boards about the pros and cons of the respective choices, and this can change from one year to the next as boards rotate.
- There is no discernable trend that millennials are steering print posters more to ePosters.

4 THE POSTER/EPOSTER LANDSCAPE IN EUROPE

The main objective of this paper is to provide a clear picture of how posters and ePosters are managed in Europe, and in particular to support this with detailed research. In addition to the above, the following addresses a number of miscellaneous, but important components that contribute to a more complete overview:

4.1 Participation and Permissions

For meetings that choose the onsite ePoster option, it is important to consider how audience participation for such a project will occur. The first thing to consider is an experienced vendor (see later) and how you will communicate with the poster authors. Do you release the contact information to the vendor to manage the invitations, or do you handle this in-house (eg emails from your own address). Some of this will depend on the vendor, but you will also need to consider the GDPR aspects of transfer of data to a third party. It is important to realise that even with ePosters you will never get 100% participation, even if that is your expectation.

Also essential is that you request author permission to present their poster as an ePoster and/or online after the meeting. You should be careful about the wording, since the intellectual property will need to remain with the author and/or his/her institute. Full details are beyond the scope of this paper.

4.2 Prior Publication

For those that are unaware of prior publication, this is a protocol among scientific journals, which state that an author cannot submit an article for publication in a journal if it has been published elsewhere. They tend to be very strict on this issue. An author who has his/her poster placed online may be considered to be in breach of this rule if the content is more or less the same, but in journal form. As indicated earlier, discussion about prior publication appears to have tricked to almost nothing, but occasionally still rears its ugly head. In general, each journal has its own prior publication rules.

4.3 Software and hardware vendors

As a rule of thumb, the software/processing and hardware for ePosters are provided by separate companies. For the hardware, it depends largely on issues such as budget, location, and design strategy. The software can be provided by a number of different companies either as a stand-alone service or part of a complete suite of scientific programme management.

There are about six ePoster vendors active in Europe. No attempt is made here to describe any of them, apart from saying that most are well-established providers. The main items to look for are:

- Lead time
- Author invitation and communication processes
- Ease of uploads.
- Embedded video and animation
- Editing and changes, including last minute
- User interface and search options
- Display for users and for moderators (eg, poster discussion sessions)
- Participant and author interaction options
- Usage and statistical reporting
- Onsite support
- Data integrity and GDPR compliance
- Budget

The hardware will depend on the chosen strategy and can be arranged via a local IT company or a vendor specialising in ePoster hardware. Most software vendors can also arrange hardware through partner companies.

4.4 Green Footprint

It is indeed true that organisers with only ePosters are using this fact to reinforce the 'green' label for their meeting(s). While this may reduce the paper load, there is no evidence that the extras for hardware, power etc compensate for the traditional presentations. It does however convey the green message.

4.5 Printing on behalf of authors

There is a new trend emerging whereby some meetings (not many yet) are considering printing the poster on behalf of the author. This is then collected at the meeting, or even hung for them. It is part of a new business model, which can generate income, at the same time be the acquisition for the digital poster, and ensure a fuller poster hall without no-shows. Such a system does not excuse the author from attending, but the organiser will know in advance and can act accordingly.

4.6 Financial Ramifications

When ePosters were first introduced around 2005, most of the discussions about the pros and cons were emotional in nature and very political, if that is the right word. Political in many senses; the issue of prior publication, cultural and generation differences and the matter of industry support. In the beginning, the cost of ePosters was often picked up by industry, but in recent years the directives of EFPIA, IFPMA and MedTech Europe² about the transparency of funding has shifted the burden to the societies.

Congress budgets are therefore a critical issue. And, ePosters are not necessarily a small budget item. As the hybrid solution appears to be the preferred option, certainly among the bigger meetings, most

2 EFPIA = European Federation of Pharmaceutical Associations

IFPMA = International Federation of Pharmaceutical Manufactureres Associations

MedTech Europe = European trade association representing the medical device companies

organisations are trying to find the best balance between print and ePosters; from both an educational and budget point of view. There is no need to have all posters exclusively in print and ePoster form. A mix is also possible.

5 CONCLUSIONS

It was inevitable that the digital revolution of the last 20 years or so would change the face of congresses. Abstract management, presentation management and the dissemination of data are all a part of this. Congress organisation has become ever more professional, and technical. ePosters have now become an important part of the puzzle, but has it been a step too far?

Based on the figures above, no. However, while it is still a growing market with more and more vendors, it does prompt more questions and emotions than other parts of the business. For example, no one ever questions the value of abstract submission and management via the internet. Posters play a very visible and commercial role at meetings and most meetings do not want this to disappear. In addition, no one has come up with a real electronic solution to the 'buzz' that a poster hall can generate when well managed.

So, from the research, it is evident that:



- Organisers equally value print posters and ePosters, but there is no clear winner.
- There is no evidence of ePosters superseding print posters. If anything, there is a trickle trend back in favour of print posters, possibly with a different business model.
- More than others, Tier 1 meetings enjoy the luxury of being able to incorporate ePosters as a hybrid offering.
- Meetings will continue to explore what works best for their authors, their participants, their post-meeting community as well as themselves.

EPILOGUE

To close, here are few actual comments from the research, in no particular order:

"You cannot talk to a computer"

"The congress is moving more and more to a paperless model, and the e-posters were first introduced in 2015. In 2016 100% of posters were e-posters"

"We did look into that but the cost are too high at the moment to go digital"

"It is still considered important to be at a paper poster board for direct contact instead of ePoster"

"Unlikely to change in favour of ePosters. Print is important for students"

"About 95% of our medical clients are reluctant to move to ePosters primarily because they fear to lack the human one on one interaction that printed posters offer"

"We wanted to move to e-posters already in 2019, but it seems that doctors prefer the printed version"

"Have considered ePosters, but beyond the budget"

"For the paper poster is HUGELY important and a lot of interaction happens at the poster boards, highly doubt we will ever move away from that (at least in the near future)"

"The Board is happy with the hybrid solution, encouraging interactions onsite with printed posters and reaching out to a wider audience with eposters online"

"Moved to ePosters only 2 years ago. Happy"

"Yes. Implementation of a couple of e-poster terminals in addition to the print posters to enlarge poster visibility. Creating an online library with the e-posters on the association's website"

"We are trying to maintain the importance of the poster at the meeting - electronic distribution allows more opportunities for presenters"

"Staff want ePosters, but board favour print"

"mostly e-posters, only 20 best posters printed"

"Wine and cheese during the poster tours attracts delegates, placing stickers during the exhibition times when evaluated becoming best poster"

"Board and staff feel strongly that print poster strategy supports higher education motivation within healthcare university environment. In other words, print visibility at a meeting"

"Tried ePosters but failed"

"We believe printed posters are here for the long haul as it gives every presenter exposure rather than risk less well known presenters/topics never having their posters viewed via an e-PO platform"

"Delegates often take photos of posters with their phone. Also ePosters?"