

MSACL 2017 US Exhibitor Report

Prepared by MSACL
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This document contains:

1. Statistics on Attendee Demographics and growth
2. Take-aways from the on-site Exhibitor Feedback Discussion Group
3. Key Attendee Feedback

I encourage you to respond with your feedback. Many changes took place this year, some more successful than others; apologies if you ran up against a planning or execution detail that we overlooked. Less successful changes are being addressed (details to follow). If you liked something, let us know. Your feedback is an important tool for shaping the next event.

Statistics and Demographics

NOTE: Up to date statistics can always be found for all MSACL conferences at https://www.msacl.org/index.php?header=About&tab=Past_Conferences

	2017 January Palm Springs	2016 February Palm Springs	2015 March San Diego	2014 March San Diego	2013 February San Diego
Total Registrants	884	1013	1034	907	832
Attendees On-Site	827	971	969	861	787
Exhibits-Only Attendees	163	186	185	150	135
Attendees (excluding known vendors)	547 (66% of all attendees)	633 (65% of all attendees)	657 (67.8% of all attendees)	582 (67.6% of all attendees)	590 (75% of all attendees)
First-time Attendees (excluding known vendors)	288 (52.6% of non-vendor attendees)	355 (56% of non-vendor attendees)	425 (64.6% of non-vendor attendees)	372 (63.9% of non-vendor attendees)	413 (70% of non-vendor attendees)
Returning Attendees (excluding known vendors)	259	278	232	210	177
Lab Director Travel Grantees	28	35	16	6	13
Young Investigator Travel Grantees	85	73	80	59	55
Trainee Travel Grantees	42	46	48	33	31
Posters	193	237	249	220	237
Podium presentations	108	118	105	69	68
Exhibitors	48	55	43	40	40

Explain for a first-ever drop in attendance?

There were 144 fewer attendees onsite this year compared to last year. There were 86 fewer non-vendor-employed attendees and 58 fewer vendor employees. After analysis of available data we can conclude that decreased attendance is primarily a reflection of a drop in 1st time new non-vendor-employed attendees. It appears that January is a challenging time to recruit new attendees and Palm Springs may be a more difficult sell for those unfamiliar with the conference program. We also heard from several previous exhibitors that there were time conflicts that prevented their attendance.

Several possible explanations for this year's drop in attendance were proposed by attendees including:

1. People did not realize it was happening so early in the year and could not get travel plans together in time.
2. It was too close to the holidays, and people still have travel fatigue.
3. January conflicts with some organizations' annual meetings.
4. It is too close to Chinese New Year.
5. The European Meeting is pulling away foreign attendance.
6. The registration price is too high.
7. Palm Springs is not an attractive location. It is too hard to get to. ***FYI, there is a new mode of travel now available. Fly into LAX and get dropped off at the Renaissance 2 hours later with a ride share with Tesloop. tesloop.com***
8. There is some travel funding uncertainty at this time / economic reasons.

It is difficult to measure and confirm each of these theories, however, several can be evaluated with available data. Table 1 below shows the country of origin of all MSACL US attendees over the past seven MSACL US meetings. The second table shows how many of our non-exhibitor-employed attendees are first year attendees versus returning attendees. From these we can determine that:

1. ***The drop in 2017 attendance can primarily be attributed to a drop in new 1st time attendees to MSACL.*** From 2011 through 2016 the average number of new 1st time attendees was 380 people. This number dropped well below average to 288 for 2017. The year with the next lowest number of new attendees was 2012, also held in January, providing evidence that January may not be a good month for recruiting new attendees.
2. ***January may indeed be a poor time to hold this conference.*** The only other year that it was held in January was in 2012, which saw low growth, albeit not negative growth. The meeting held in 2016 also had low growth despite being held in February. We have assumed this is because it was the first year of the location change to Palm Springs.
3. ***Chinese New Year does NOT appear to be a factor for attendees from China.*** Although we do not have data on Chinese-Americans.
4. ***Attendance from Europe has NOT significantly diminished due to MSACL EU.*** The first year of the European meeting was in 2014. Since that time there has not been a significant drop in European attendance at MSACL US, however it is reasonable to assume that there may have been growth in European attendees had MSACL EU not been established.
5. ***The registration price may have reached a tipping point of acceptability.*** There was a 9% increase in registration price from 2015 to 2016. While attendance in 2016 did not shrink, it also did not grow at expected levels.
6. ***The number of returning attendees for 2017 is within a normal range.*** Numbers did not go down due to previous attendees deciding not to return.

As a side note, some attendees have speculated that colleagues might not return because they see mostly the same people year after year. It is true that each year a larger percentage of people on-site have been to an MSACL meeting some time in the past, and that percentage jumped when the meeting moved to Palm Springs, due to reduced growth. However, despite this increase in returnee proportions, **over half of the MSACL 2017 US non-exhibitor-employed attendees were new 1st time attendees**. The perception does not appear to match the reality, indicating that perhaps first-time attendees are not receiving as much exposure as returning attendees.

Table 1. Country of origin of ALL MSACL US attendees (both exhibitor-employed and non-exhibitor employed) over the past seven years

	2017 (Jan) \$1200	2016 (Feb) \$1200	2015 (Mar) \$1100	2014 (Mar) \$1100	2013 (Feb)	2012 (Jan)	2011 (Feb)
Armenia							1
Australia	3	4	2	6	3	2	1
Austria		1	1	2		1	4
Belgium	1	1		3	1	1	1
Brazil	1		3			2	2
Canada	46	42	49	39	34	26	22
China	9	8	12	5	1		
Croatia	2						
Czech Rep		1	2				
Denmark	1	1	4	1	3	1	3
Egypt			1				
Estonia	2		1				
Finland	2	3	1		1	1	3
France	3	2	6	2	5	3	2
Germany	10	10	15	12	16	9	13
Hong Kong			2	1	1	2	
Hungary			1		3		
Iceland	1	1	2	1			
India		1	1	1		1	
Ireland	1		1			1	1
Israel				1	1	1	
Italy	4	4	1	1			
Japan	5	6	3	6	10	7	1
Kenya			1				

Korea, Re	20	29	21	29	20	13	5
Liechtens		1					1
Luxembour			1	1		1	
Malaysia						1	
Mexico			1				
Morocco	1						
Netherlan	16	12	11	8	10	10	4
New Zeala				1	1	1	
Poland	1						
Qatar				2		1	
Russian F	2	2	2			1	2
Saudi Ara			5	1	2		2
Singapore	1				1	1	
Spain					3		
Slovenia		1					
Sweden	2	8	5	4	2	2	3
Switzerla	3	4	7	3	7	6	8
Taiwan	3	6	12	2			
Thailand		1					
Turkey		4	2	1			
United Ki	31	35	28	30	30	13	5
United St	656	783	765	698	632	559	531
Unknown							42
Total non-US	171	188	204	163	155	108	83
Total Attendees	827	971	969	861	787	667	657

Table 2. Analysis of MSACL US attendance patterns over the past eight years (non-exhibitor employed attendees only)

The non-exhibitor employed attendees are determined by removing all Exhibits Only attendees as well as any attendee that is registered with an email address domain matching an exhibitor email domain.

	2017 (Jan)	2016 PalmS.	2015	2014	2013	2012 (Jan)	2011	2010
Non-exhibitor Attendees								
1st Year Attendees (% of total non-exhibitor attendees)	288 (52.6)	355 (56)	425 (64.6)	372 (63.9)	413 (70)	348 (74)	382 (78)	362
2nd Consecutive Year Attendees (% of prev year new attendees)	77 (21.6)	100 (23.5)	87 (23.4)	81 (19.6)	72 (20.7)	63 (16.5)	108 (29.8)	
3rd Consecutive Year Attendees	49	37	35	32	26	36		
4th Consecutive Year Attendees	18	18	20	16	21			
5th Consecutive Year Attendees	11	14	9	13				
6th Consecutive Year attendees	5	5	9					
7th Consecutive Year Attendees	4	6						
8th Consecutive Year Attendees	6							
Skipped 1 year	34	35	25	33	36	23		
Skipped 2 years	12	19	10	15	17			
Skipped 3 years	10	2	6	5				
Skipped 4 years	1	7	4					
Total Returning (% of total non-exhibitor) (% of prev year attendees)	259 (47.3) (40.9)	278 (43.9) (42.3)	232 (35.3) (39.8)	210 (36) (35.6)	177 (30) (37.6)	122 (25.9) (24.9)	108 (22) (29.8)	
Total non-exhibitor-employed on-site	547	633	657	582	590	470	490	362
Total registrants on-site including exhibitor employees	827	971	970	843	771	625	607	447

Feedback from 2016 US and/or 2015 US attendees who did not attend 2017 US

With just over 100 responses from prior MSACL conference attendees who were unable to attend MSACL 2017 US, we can see that there is no single standout issue cited for not attending. The most cited reason is lack of travel funding. The location, date and registration cost were also cited in smaller numbers. This highlights the need to continue the Travel Grant program to ensure attendees

with compelling work to present, as well as Lab decision makers, are able to attend.

I wanted to attend, but was unable.

Average: 2.40

0=Not at All (n=2)

1=Somewhat (n=9)

2=Mostly (n=25)

3=Definitely (n=45)

Responses: 81

Declared Not Applicable: 21

I plan to attend MSACL 2018 US to be held in Palm Springs Jan 21-25, 2018

Average: 1.42

0=Not at All (n=12)

1=Somewhat (n=31)

2=Mostly (n=30)

3=Definitely (n=8)

Responses: 81

Declared Not Applicable: 11

I didn't attend because I prefer other Mass Spec/Clinical meetings. Please indicate your preferred meetings in the Comments section.

Average: 0.27

0=Not at All (n=59)

1=Somewhat (n=15)

2=Mostly (n=3)

3=Definitely (n=0)

Responses: 77

Declared Not Applicable: 14

I didn't attend because the program is no longer relevant to my interests.

Average: 0.29

0=Not at All (n=72)

1=Somewhat (n=9)

2=Mostly (n=2)

3=Definitely (n=4)

Responses: 87

Declared Not Applicable: 9

I didn't attend due to lack of travel funding.

Average: 1.24

0=Not at All (n=26)

1=Somewhat (n=28)

2=Mostly (n=12)

3=Definitely (n=17)

Responses: 83

Declared Not Applicable: 12

I didn't attend because I prefer to attend the MSACL European Congress.

Average: 0.22

0=Not at All (n=64)

1=Somewhat (n=5)

2=Mostly (n=4)

3=Definitely (n=1)

Responses: 74

Declared Not Applicable: 21

I didn't attend because the week of January 22-26, 2017 conflicted with other events or was too close to holidays such as Chinese New Year. I would have preferred a different date.

Average: 0.66

0=Not at All (n=47)

1=Somewhat (n=15)

2=Mostly (n=7)

3=Definitely (n=7)

Responses: 76

Declared Not Applicable: 16

I didn't attend because I simply did not realize that it was taking place so early in the year. I would have attended had I been more aware of the deadlines.

Average: 0.25

- 0=Not at All (n=63)
- 1=Somewhat (n=11)
- 2=Mostly (n=1)
- 3=Definitely (n=2)

Responses: 77

Declared Not Applicable: 15

I didn't attend because I don't want to travel to Palm Springs in particular. I prefer San Diego.

Average: 0.82

- 0=Not at All (n=42)
- 1=Somewhat (n=17)
- 2=Mostly (n=8)
- 3=Definitely (n=10)

Responses: 77

Declared Not Applicable: 15

I didn't attend because I find it to be over-priced. (Early Bird Rates: \$1200 Industry, \$550 Academic, \$100 Student)

Average: 0.63

- 0=Not at All (n=44)
- 1=Somewhat (n=27)
- 2=Mostly (n=6)
- 3=Definitely (n=4)

Responses: 81

Declared Not Applicable: 12

Exhibitor Feedback Discussion Group Take-Aways

Eight exhibitor representatives joined the feedback meeting. Main points of discussion were as follows:

1. There had been a suggestion earlier in the day to move the Exhibitor Feedback meeting to a time slot during a scientific session so that more exhibitors can attend. All present agreed this would be a good change for next year.
2. Amber acknowledged the terrible, awful, horrible mistake of having the Plenary in the same room as the Exhibits. Happy to report that while MSACL staff members suffered greatly during this experiment (your pain is our pain), we have survived to assure you that it won't happen again. (Ditto for 8am coffee service in the Exhibit Hall.) If we must have more space than the California Ballroom provides, and we need to hold the plenary in the same area as this year, the air wall will be up, and lights on, as it was during the Thursday AM Plenary.
3. We reviewed an earlier version of the Attendee retention table shown above and discussed possible reasons that attendance is down this year, as well as ways that we might be able to confirm hypotheses. This is discussed in detail early in this report.
4. Alternate locations were suggested – all present recommended the Gaylord convention hotel chain as a good choice.
5. Amber asked those present “What is it that sets MSACL apart from other conferences and makes MSACL, MSACL. If we move to another location – what do we need to preserve?” The consensus was that the most valuable aspect of MSACL is the **contained, community** feeling. This is partly due to providing meals so that people don't have to go off-site. People are not distracted with finding their next meal. Also the program keeps everyone in the same area at any given time which is nice for allowing exhibitors to also attend scientific sessions.
6. We discussed the option to move the 2018 conference to April. All decided that the week after Easter was a bad time. We will stick with January for 2018.
7. We explored the idea of moving to downtown San Diego. Most were not keen on the idea due to the very close proximity to many restaurants downtown which would certainly reduce attendee presence onsite – damaging the community feeling noted above.

Off-site Vendor/Client Dinner Meetings

We are aware that Vendors value the opportunity to schedule private off-site meetings with their clients. This is a dangerous area for us to navigate – if too many people go off-site, the contained, community feeling that MSACL is known for could be jeopardized. We do not officially encourage or communicate with Vendors regarding off-site activities, preferring to shape the meeting agenda in a way that accommodates these activities to a limited extent. We structured the 2017 US schedule to include one big buffet meal each day. On the opening day, Tuesday, we served the buffet

meal at Lunch, served only appetizers in the evening and ended the scheduled events early enough for vendors to take attendees off-site for dinner. However, most vendors did not take people out Tuesday night, instead scheduling dinners for the following night during our large Mexican Fiesta Dinner event. This left our attendees with a feeling of not getting enough food Tuesday night, and either feeling left out of the activities on Wednesday, if they had gone off-site with a vendor, or feeling like there were not enough people at the Dinner event for really great networking because so many people had left.

For next year, we will swap the event nights to accommodate Vendors preference to go off-site on the second night of the conference. Tuesday night we will provide a program that encourages everyone to stay onsite, and Wednesday we will have a lighter program, so that Vendors have an opportunity for private meetings. We are exploring providing vendors with the opportunity to host non-private dinner events onsite on Wednesday evening using the venue caterer in rooms/halls subsidized by MSACL. ***If this is of interest, please contact us at your earliest convenience to discuss.***

Single Day Registrations

We get many requests for single day registrations. We have tried single day registrations in the past, but their limits were not respected so we decided to discontinue the option. However, we are considering offering the single day pass for the final day of the conference. These will only be distributed on Thursday morning, eliminating the possibility for abuse. Additionally, this may help boost attendance on the final day, which usually suffers a decrease in traffic from people leaving town early.

Key Attendee Feedback

Great News! Our attendees had many good things to say about our Exhibitors and Corporate Workshops this year. In prior years we have heard a negative tone from attendees regarding the necessary annoyance of having Exhibits with vendors trying to sell things and Corporate Workshops were often described as a waste of time that took up too much of the agenda. It looks like this year we have left our attendees wanting more. Your workshop speaker choices were widely praised and people are asking for more dedicated time to chat with vendors in the Exhibit Hall. Congratulations on turning this corner with the attendees!

We are also pleasantly surprised to report that our trial of a 7:00am Workshop time slot was successful. With so many attendees on East Coast time, there was a strong turnout. There were three workshops offered and room counts were 49, 46, and 42. We will likely continue to offer this time slot in the future.

I'll also note a change that has not been commented on. The afternoon workshops were shortened to 30 minutes. I have heard no negative feedback from vendors on this change, and considering the overall positive feedback from attendees regarding the workshops, we will likely continue to offer the 30 minute afternoon time slot rather than 60 minutes.

Selected feedback results with 20% of attendees responding, thus far, are represented below. There will be a reminder email for attendees to provide feedback and more responses will follow .

I found the congress to be intellectually stimulating.

Average: 2.43

0=Not at All (n=3)

1=Somewhat (n=13)

2=Mostly (n=49)

3=Definitely (n=83)

Responses: 148

Declared Not Applicable: 16

I found the congress to be beneficial for networking.

Average: 2.40

0=Not at All (n=5)

1=Somewhat (n=19)

2=Mostly (n=36)

3=Definitely (n=88)

Responses: 148

Declared Not Applicable: 16

I attended a Corporate Workshop and found it worthwhile.

Average: 2.17

0=Not at All (n=1)

1=Somewhat (n=21)

2=Mostly (n=45)

3=Definitely (n=41)

Responses: 108

Comments:

-Kind of. There needs to be more real world customers presenting with the vendors to validate that products can be used in a clinical lab for an actual assay rather than having a vendor choke you with information about the features and benefits of their products
(Attendee-Industry)

-The corporate workshops were the highlight of the conference besides the poster session. They selected excellent speakers and in general gave very good presentations.
(Attendee-Industry)

-Attended several, but found all of them rather disappointing. Uninspired.
(Attendee-Industry)

-thermo/dominion was good. I thought our Phenomenex one was well received.
(Attendee-Industry)

-eyes opening workshop, describing applications on automation, integrated LCMS/MS approach toward Oral fluid testing
(Attendee-Industry)

-I like corporate workshops
(Attendee-Industry)

-Some of the workshops were good, others were just alright.
(Attendee-Student)

-I'm a vendor but the corporate workshops are invaluable in terms of the package.
(Exhibits-Industry)

-Some individuals presenting did not present any actual information on methodology, analytes analyzed, specific results due to their legal obligations surrounding proprietary information; this should not be allowed.
(Grantee)

-Would like to have more of these! One downside was that many of the workshops were scheduled in the same time, overlapping. This conflicting schedule made hard to pick and choose. A better coordination/timing would be very welcome and more helpful! Also some of these very interesting workshops were poorly advertised. Please forward this thoughts/feedback to vendors.
(Grantee)

-We know corporate workshops are for vendors trying to sell things. And that's ok. Some could have been a bit more engaging.
(Grantee)

Declared Not Applicable: 44

I valued the opportunity to chat with Vendors in the Exhibit Hall.

Average: 2.62

0=Not at All (n=2)

1=Somewhat (n=7)

2=Mostly (n=36)

3=Definitely (n=103)

Responses: 148

Declared Not Applicable: 10

I like Palm Springs, but would prefer to attend in April, rather than January.

Average: 1.29

0=Not at All (n=44)

1=Somewhat (n=38)

2=Mostly (n=40)

3=Definitely (n=23)

Responses: 145

Declared Not Applicable: 23

I find Palm Springs to be an effective location to hold the MSACL congress.

Average: 2.18

0=Not at All (n=6)

1=Somewhat (n=31)

2=Mostly (n=58)

3=Definitely (n=73)

Responses: 168

Declared Not Applicable: 1

The food and beverage provided was acceptable.

Average: 2.40

0=Not at All (n=9)

1=Somewhat (n=14)

2=Mostly (n=39)

3=Definitely (n=95)

Responses: 157

Declared Not Applicable: 2

I would prefer if MSACL moved back to San Diego, even though the hotel prices might be much higher (\$240-290).

Average: 1.04

0=Not at All (n=58)

1=Somewhat (n=22)
2=Mostly (n=17)
3=Definitely (n=23)

Responses: 120
Declared Not Applicable: 26

I think this congress is over-commercialized. Too many exhibitors. Too many corporate logos.

Average: 0.22

0=Not at All (n=110)
1=Somewhat (n=25)
2=Mostly (n=1)
3=Definitely (n=1)

Responses: 137
Declared Not Applicable: 19

I found the Scientific Program strong.

Average: 2.29

0=Not at All (n=4)
1=Somewhat (n=17)
2=Mostly (n=61)
3=Definitely (n=69)

Responses: 151
Declared Not Applicable: 12

I am limited to attending one or two conferences per year.

Average: 1.60

0=Not at All (n=20)
1=Somewhat (n=29)
2=Mostly (n=32)
3=Definitely (n=26)

Responses: 107
Declared Not Applicable: 58

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