

Global Trends and the Future of the International Conference Industry

Mathias Posch



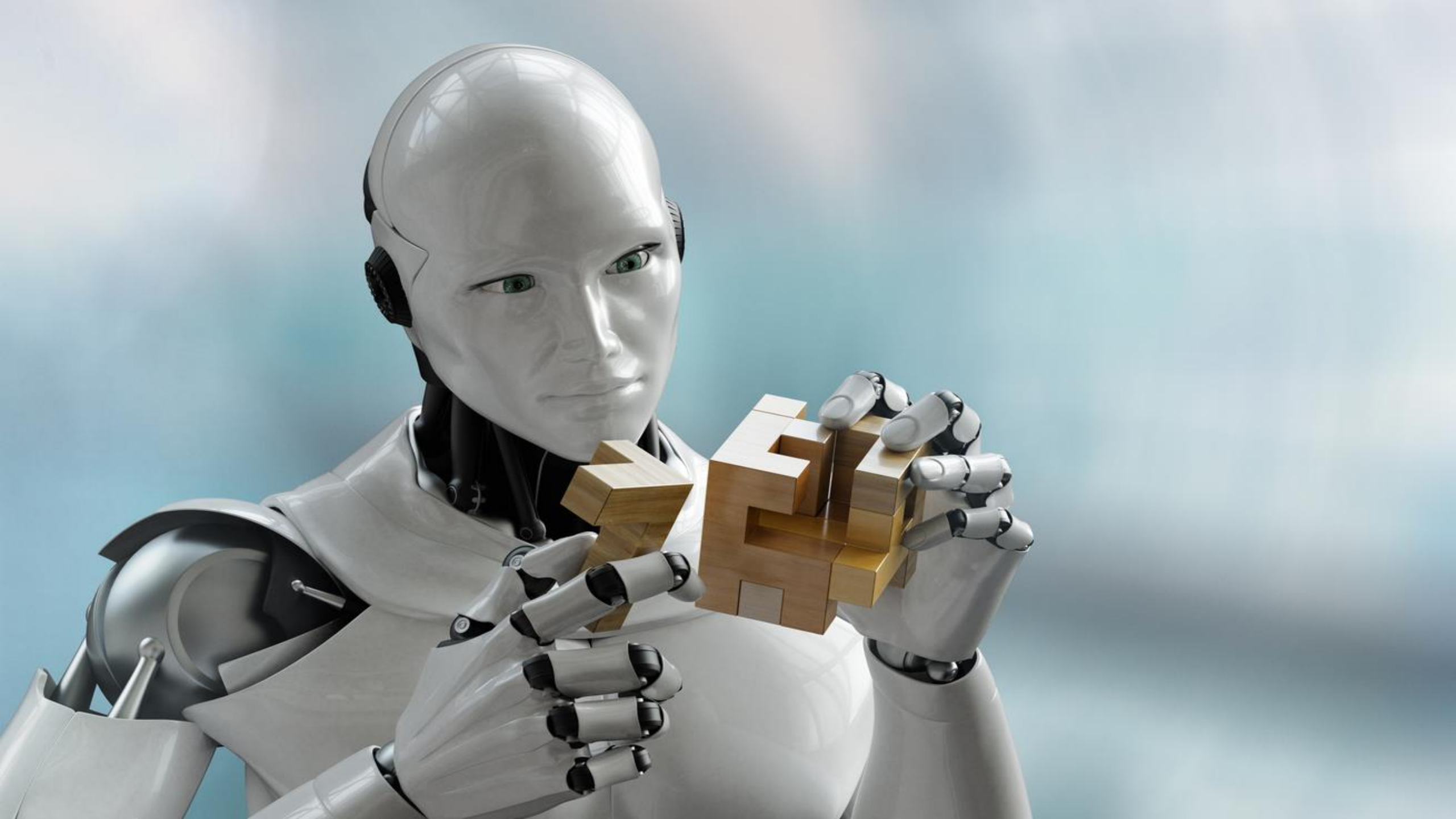
The thing about
predicting the future....

**“We don't like their sound.
Groups of guitars are on
the way out”**

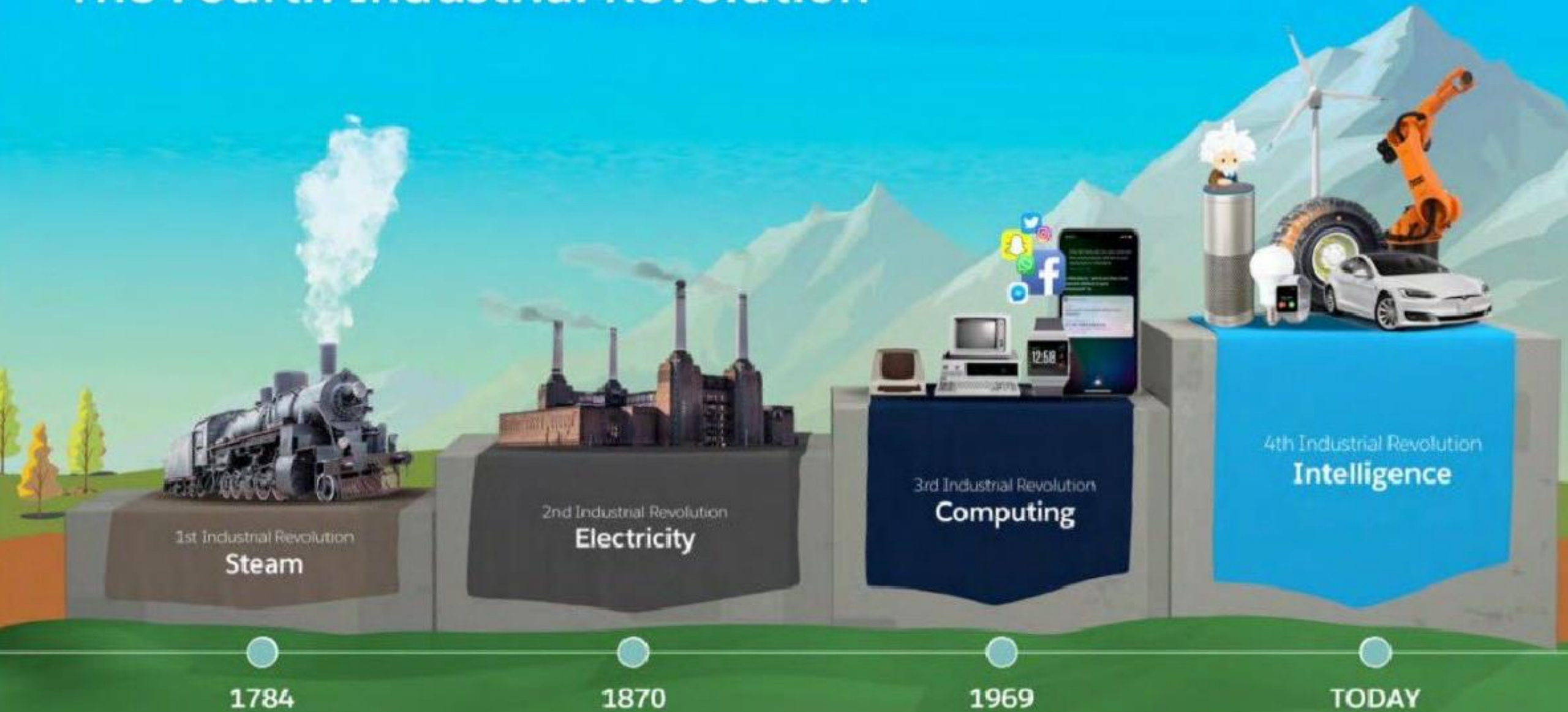
Decca Records 1962





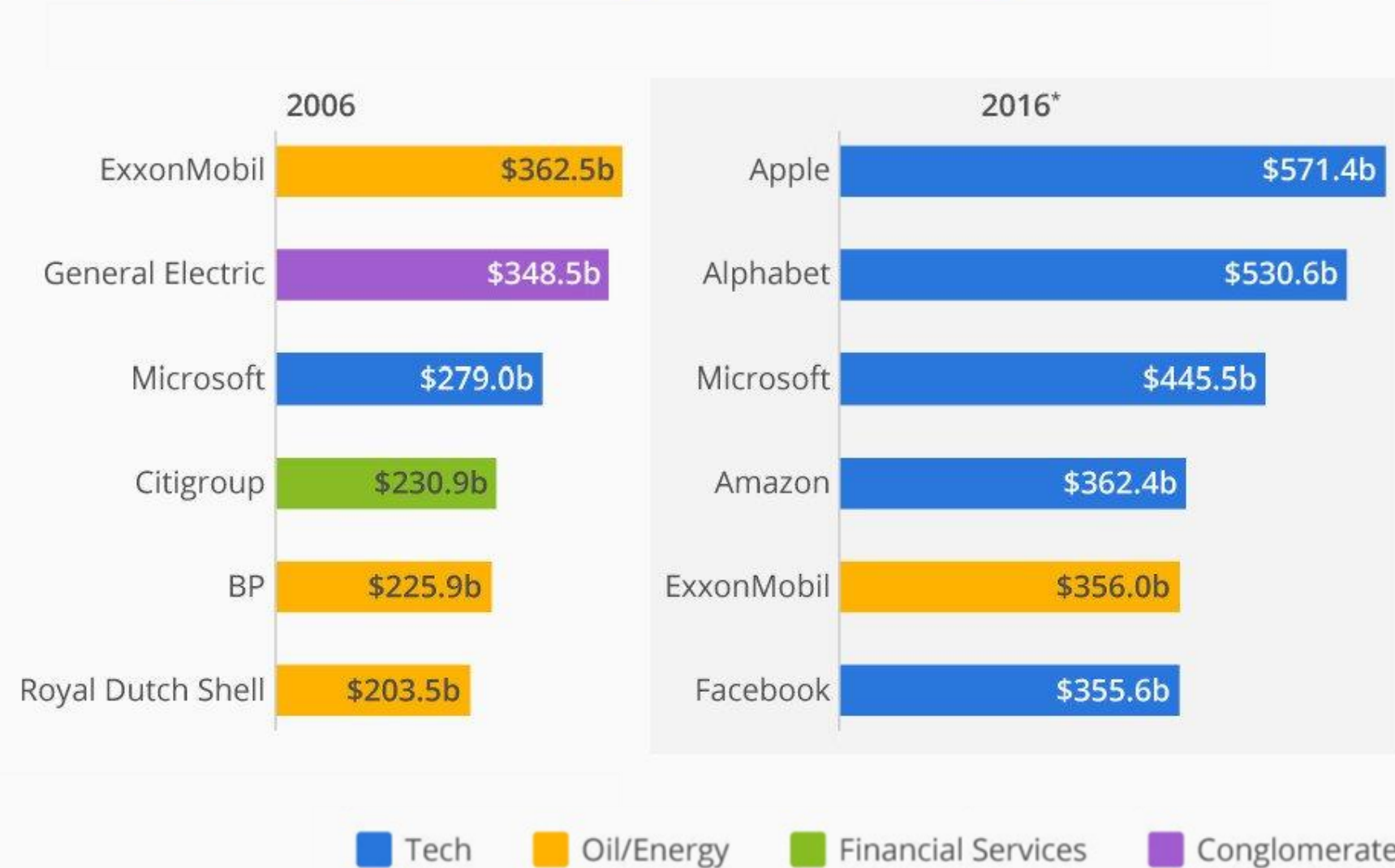


The Fourth Industrial Revolution



The Age of Tech

Market capitalization of the world's most valuable public companies





**Apple could buy
Disney or Coca-Cola**

Apple's cash and marketable securities are up to \$160 billion, according to the company's latest financial report.

Apple's market capitalization is up to \$1.5 trillion, according to the company's latest financial report.

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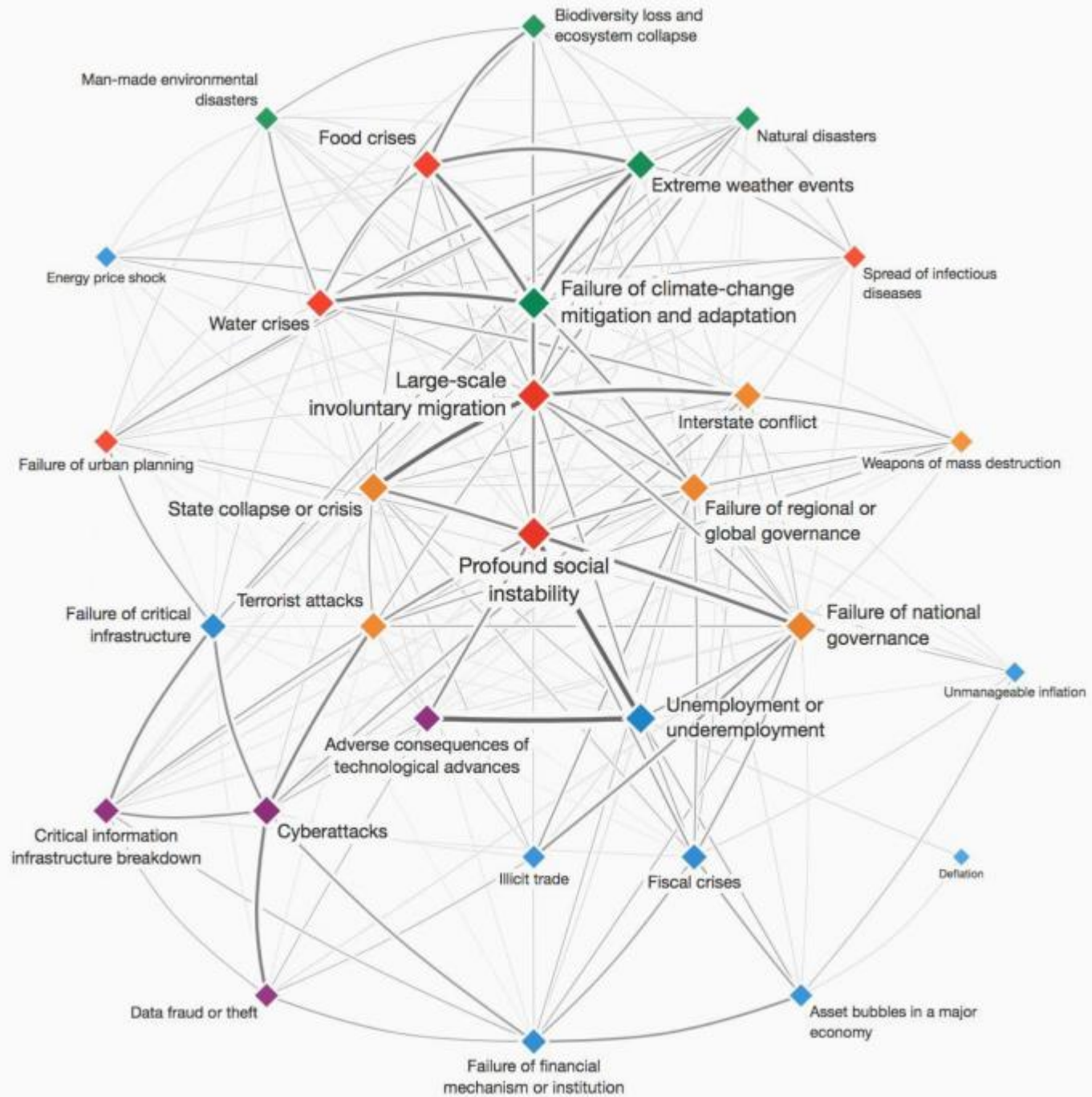
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NUMBER OF YEARS IT TOOK FOR EACH PRODUCT TO REACH 50 MILLION USERS

Automobile



62 years

Telephone



50 years

Electricity



46 years

Credit Card



28 years

Television



22 years

ATM



18 years

Debit Card



12 years

Internet



7 years

PayPal



5 years

YouTube



4 years

Facebook



3 years

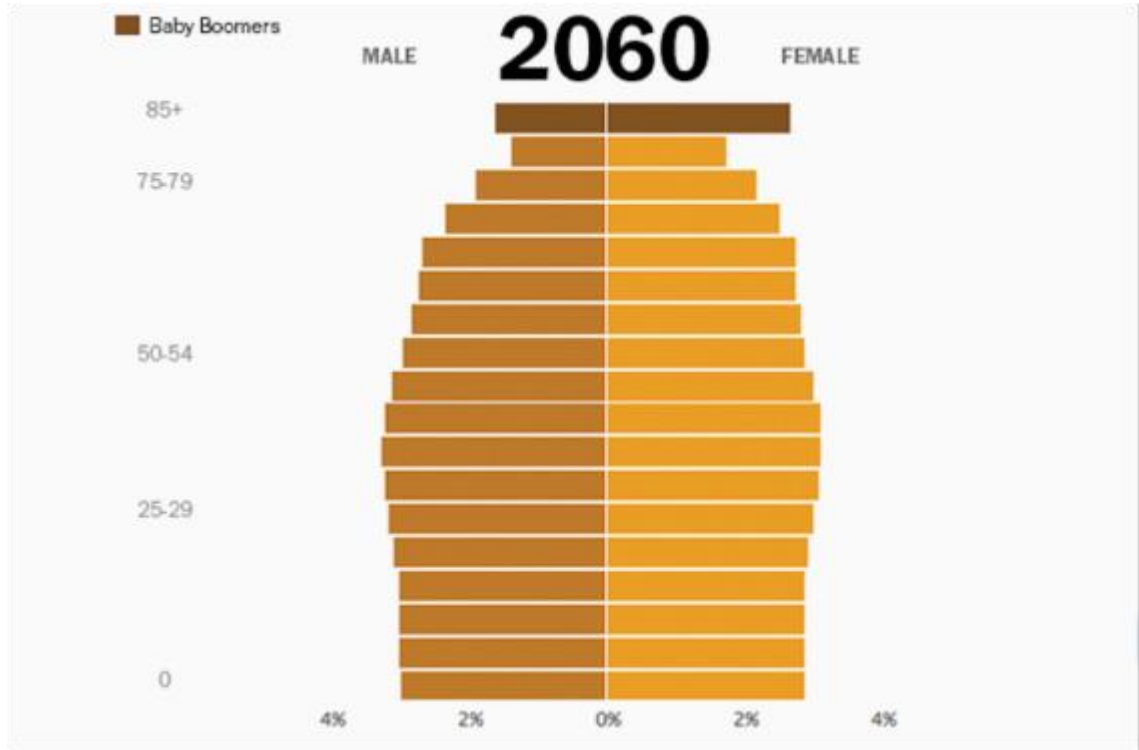
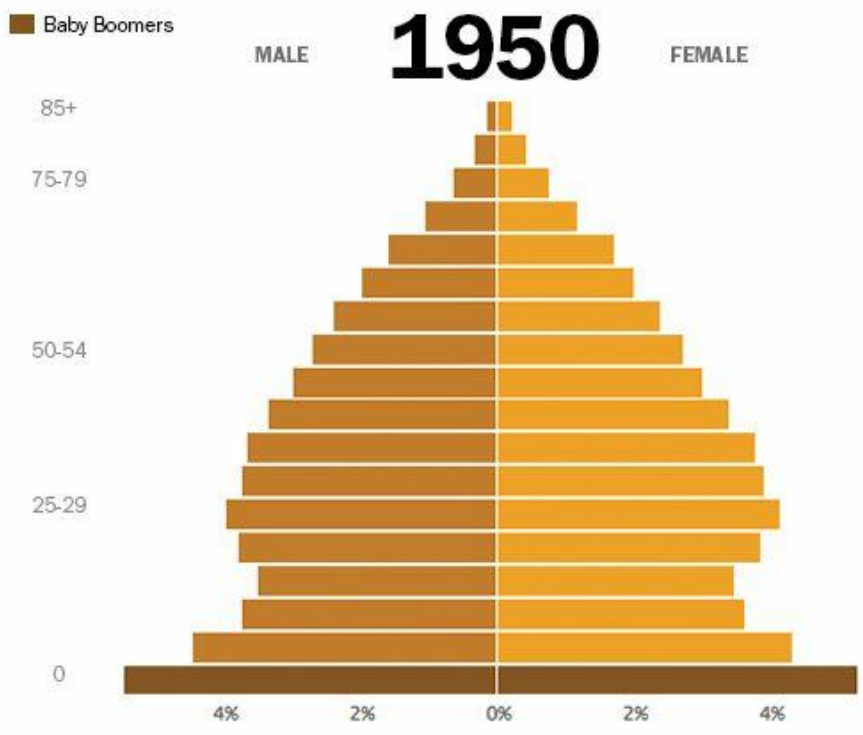
Twitter



2 years



19 days



PEW RESEARCH CENTER

Good & Green Guides

The world's largest taxi company, owns no vehicles

Facebook

The most valuable retailer, has no inventory

Airbnb

The leading sustainable travel guide specialist, has no guides

Uber

The world's most popular media owner, creates no content.

Alibaba

The world's largest accomomodation provider, owns no real estate.

The world's largest taxi firm, Uber, is buying cars.
The world's most popular Media company,
Facebook, now commissions content.
The world's most valuable retailer is now Amazon,
and carries a lot of inventory.
And the world's largest accommodation provider,
Airbnb, increasingly owns real estate.
Things change.

This won't do so well, Tom Goodwin, 2018

VUCA

VOLATILITY

Equity, bond and currency market volatility; the lack of stability and predictability.

UNCERTAINTY

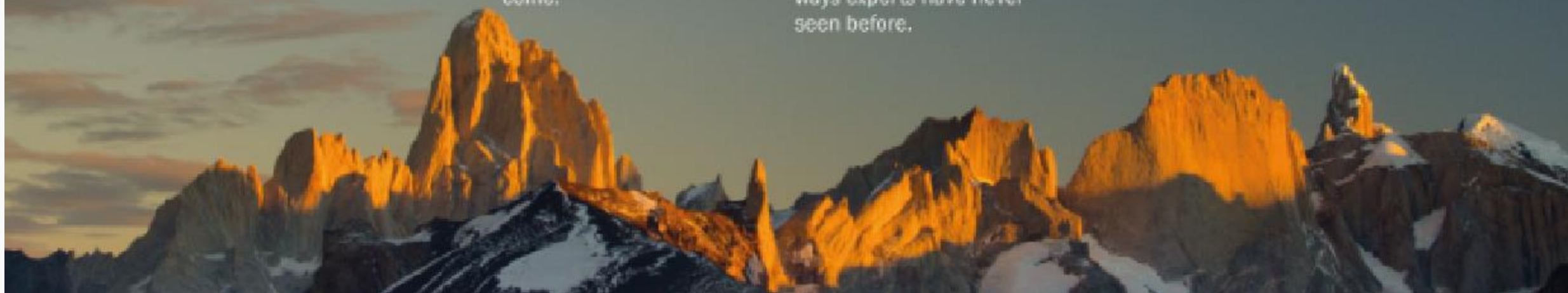
The potential change in the inflation index calculation, the potential switch to "smoothing" for pension funds calculating their recovery plan; the lack of ability to foresee what major changes might come.

COMPLEXITY

In understanding these financial markets in the era of the "new normal". The proliferation and increasing complexity of new financial instruments and regulation to deal with increasingly complex markets, moving in ways experts have never seen before.

AMBIGUITY

The resulting feeling. Is this the great rotation from bonds to equities? Or will bond yields stay low for longer? What is the best course of action?





sions combined
l/100 km; 276-263 g/km



Mercedes-Benz Is Thinking of Leaving the Detroit Auto Show

Photographer: Daniel Acker/Bloomberg

By **Christoph Rauwald**

February 10, 2018, 6:21 AM GMT+8

- Luxury carmaker increasingly shifting to tech fests like CES
- Search is on for new ways to show connected, driverless cars

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CHART 14

Considering the current economic conditions,
how concerned are you with the following issues?

Total Responses: 220

4 and 5, extremely concerned

1 Membership
recruitment: 71%

2 Membership
retention: 65%

3 Competition: 61%

4 Sponsorship: 57%

5 Attendance at other
educational seminars: 54%

6 Product sales: 53%



cross cultural competencies



social intelligence



transdisciplinarity



virtual collaboration



adaptative thinking



cognitive load management



MEETING TRENDS
ICCA REPORT

Global Trends and the Future of the International Conference Industry



Meeting Trends The ICCA Report

BACKGROUND

- This special edition of the ICCA Statistics Report, covering the International Association Meetings Market from 1963 until 2017 is published as part of ICCA's 55-year anniversary
- The data was used in a 5-year aggregation for the 55-year figures in order to show the major trends.

A Modern History of
International Association
Meetings – Update

1963 | **2017**

CRITERIA

The ICCA Statistics Reports are based on the ICCA Association Database, which means the figures cover meetings organised by international associations

Which:

Take place on a regular basis

Rotate between a minimum of three countries

Have at least 50 participants

THE ASSOCIATION MEETINGS MARKET: 1963-2017

1. Total number of meetings

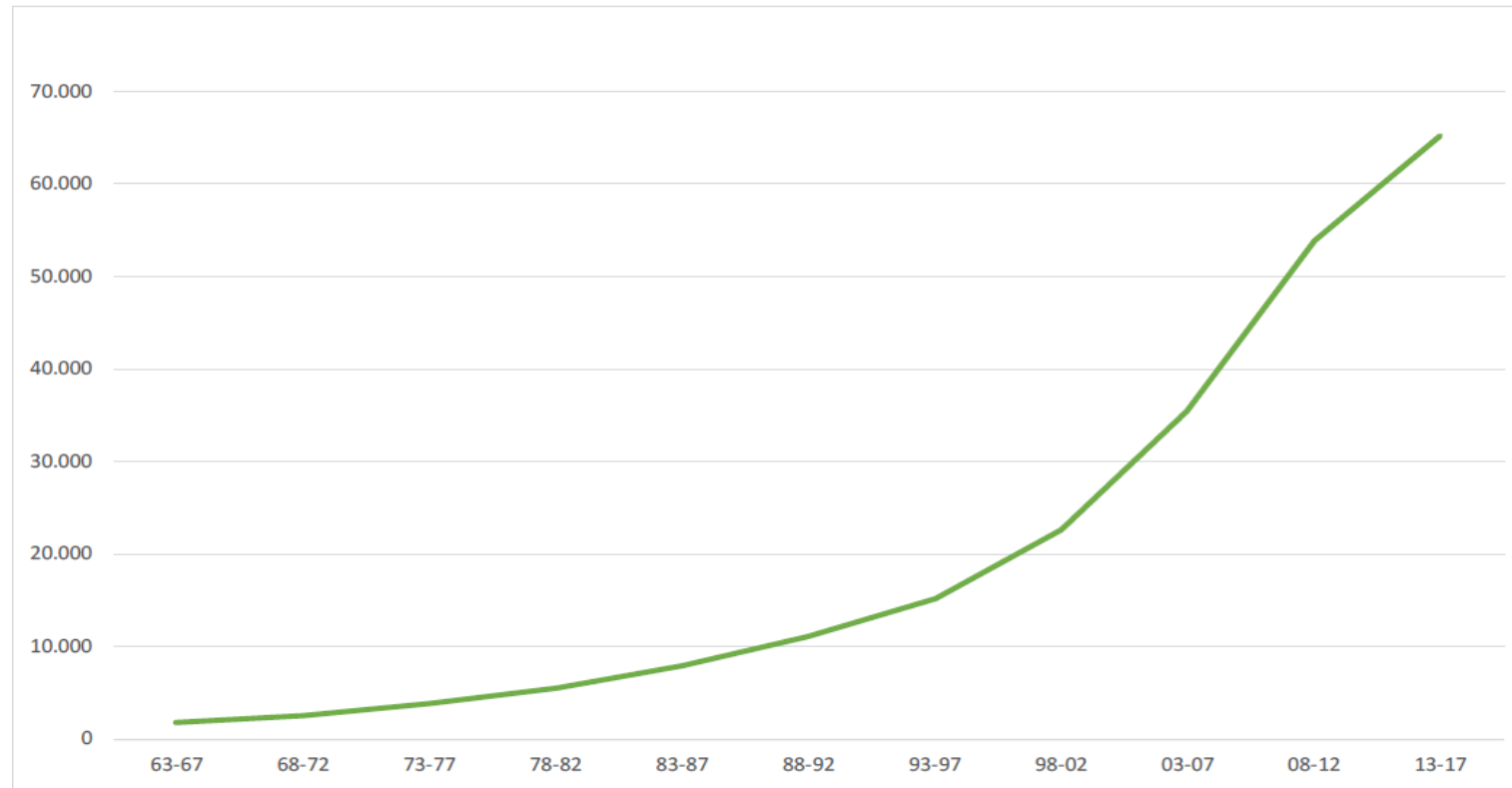


Figure 1: *Number of meetings 1963-2017, 5-year aggregated data*

3. Number of meetings per region

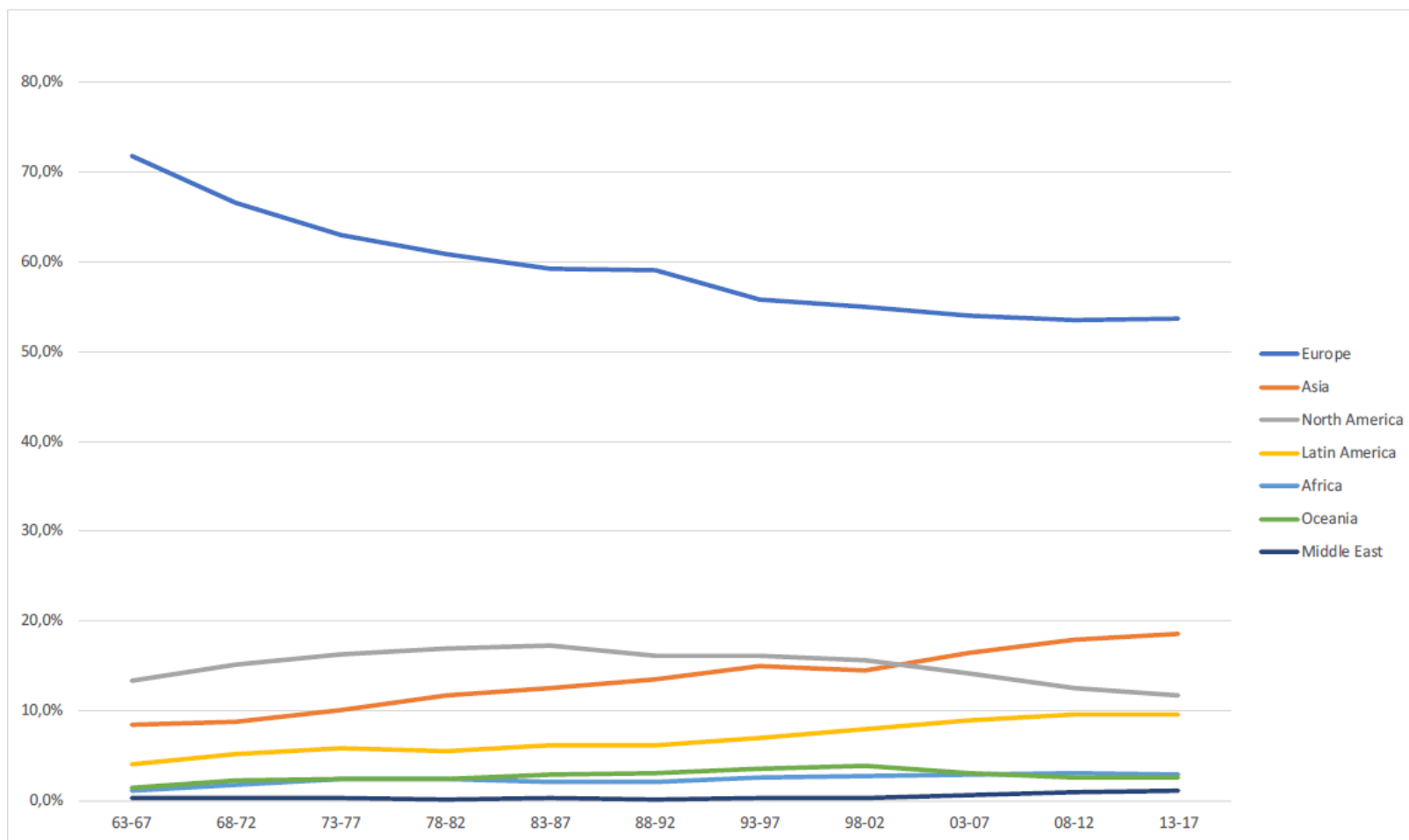


Figure 3: Market share per region by number of meetings

4. Number of meetings per country (absolute)

Rank	Country	63-67	68-72	73-77	78-82	83-87	88-92	93-97	98-02	03-07	08-12	13-17
1	U.S.A.	167	275	411	638	951	1,279	1,711	2,415	3,312	4,481	5,014
2	Germany	144	208	297	454	645	754	872	1,308	2,001	2,952	3,633
3	United Kingdom	162	223	314	470	541	729	947	1,271	1,685	2,406	3,117
4	France	144	198	285	368	485	751	869	1,210	1,696	2,393	2,868
5	Spain	49	77	110	147	251	433	561	913	1,515	2,336	2,830
6	Italy	100	121	169	236	399	530	678	1,105	1,643	2,304	2,666
7	China-P.R.	0	0	1	7	54	138	203	386	1,038	1,882	2,186
8	Japan	61	82	123	191	296	484	636	843	1,248	1,661	2,032
9	Netherlands	88	116	157	226	316	495	584	752	941	1,421	1,722
10	Canada	32	62	142	207	330	407	536	750	1,043	1,402	1,596
11	Brazil	14	15	55	78	124	183	238	469	832	1,351	1,422
12	Republic of Korea	4	8	17	30	61	116	198	369	681	1,152	1,422
13	Portugal	10	22	16	46	92	153	237	399	684	1,053	1,405
14	Austria	74	58	118	145	191	280	367	442	829	1,184	1,384
15	Australia	18	44	68	92	164	277	457	727	844	1,125	1,283
16	Sweden	70	80	115	149	251	334	374	576	726	1,089	1,275
17	Belgium	48	75	97	160	197	248	326	398	562	1,009	1,158
18	Switzerland	64	95	143	195	244	297	326	488	766	1,112	1,116
19	Poland	24	25	42	54	55	72	149	277	488	786	1,039
20	Mexico	28	52	63	95	76	107	198	354	632	869	988
	Other	422	729	1,078	1,573	2,187	3,127	4,822	7,206	12,401	20,055	25,100
	Total	1,723	2,565	3,821	5,561	7,910	11,194	15,289	22,658	35,567	54,023	65,256

5. Number of meetings per city

Rank	Country	63-67	68-72	73-77	78-82	83-87	88-92	93-97	98-02	03-07	08-12	13-17
1	Paris	90	95	125	152	178	261	299	393	605	885	1,079
2	Vienna	60	41	72	92	119	182	231	280	536	760	950
3	Berlin	19	21	38	66	96	148	169	278	485	683	945
4	London	88	108	110	143	162	167	176	273	383	657	945
5	Barcelona	12	24	19	31	68	121	189	280	458	750	918
6	Singapore	2	10	21	46	88	114	159	234	432	638	795
7	Madrid	26	35	53	62	97	131	127	200	314	493	782
8	Lisbon	8	11	12	26	52	91	139	209	358	521	692
9	Seoul	4	8	17	28	55	103	154	231	383	586	691
10	Prague	33	29	24	25	30	81	153	227	399	536	688
11	Amsterdam	29	49	73	84	100	172	190	257	344	550	652
12	Copenhagen	46	32	65	75	105	131	222	266	335	543	631
13	Brussels	29	47	56	79	113	121	129	161	225	483	585
14	Beijing	0	0	0	5	38	91	137	197	428	644	582
15	Hong Kong	2	12	8	27	41	82	153	209	312	461	580
16	Dublin	14	29	28	46	62	74	104	126	271	369	563
17	Rome	39	43	34	49	76	99	117	211	314	490	560
18	Budapest	18	35	26	54	97	149	220	216	381	481	558
19	Istanbul	8	15	11	9	18	41	95	114	281	598	557
20	Buenos Aires	5	19	31	33	65	90	100	165	276	466	531
	Other	1,197	1,906	3,004	4,434	6,265	8,768	12,055	18,195	28,213	42,655	51,282
	Total	1,729	2,569	3,827	5,566	7,925	11,217	15,318	22,722	35,733	54,249	65,566

In 2017, Tokyo was ranked 18

Asia Pacific: number of meetings per country

Rank	COUNTRY	# MEETINGS
1	Japan	414
2	China-P.R.	376
3	Republic of Korea	279
4	Australia	258
5	India	175
6	Thailand	163
7	Singapore	160
8	Chinese Taipei	141
9	Hong Kong, China-P.R.	119
10	Malaysia	112
11	Indonesia	89
12	Vietnam	64
13	Philippines	56
14	New Zealand	55
15	Macao, China-P.R.	39
16	Israel	37
17	Iran	20
18	Sri Lanka	19
19	Nepal	15
20	Cambodia	14
21	Myanmar	13
22	Kazakhstan	11
23	Azerbaijan	10
24	Fiji	8
25	Mongolia	6
26	Bangladesh	5
26	Laos	5
	Others	27
	Totals	2,690

Asia Pacific: number of meetings per city

Rank	CITY	# MEETINGS
1	Singapore	160
2	Seoul	142
3	Hong Kong	119
4	Bangkok	110
5	Tokyo	101
6	Beijing	81
7	Sydney, NSW	76
7	Taipei	76
9	Melbourne, VIC	67
10	Kuala Lumpur	65
11	Shanghai	61
12	New Delhi	59
13	Kyoto	46
14	Manila	42
15	Bali	40
16	Macao	39
17	Jeju	37
18	Busan	33
19	Brisbane, QLD	29
19	Ho Chi Minh City	29
21	Nagoya	25
22	Sapporo	24
23	Auckland	22
23	Guangzhou	22
23	Mumbai	22
23	Xi'an (Sian)	22
27	Chiang Mai	21

6. Average number of participants

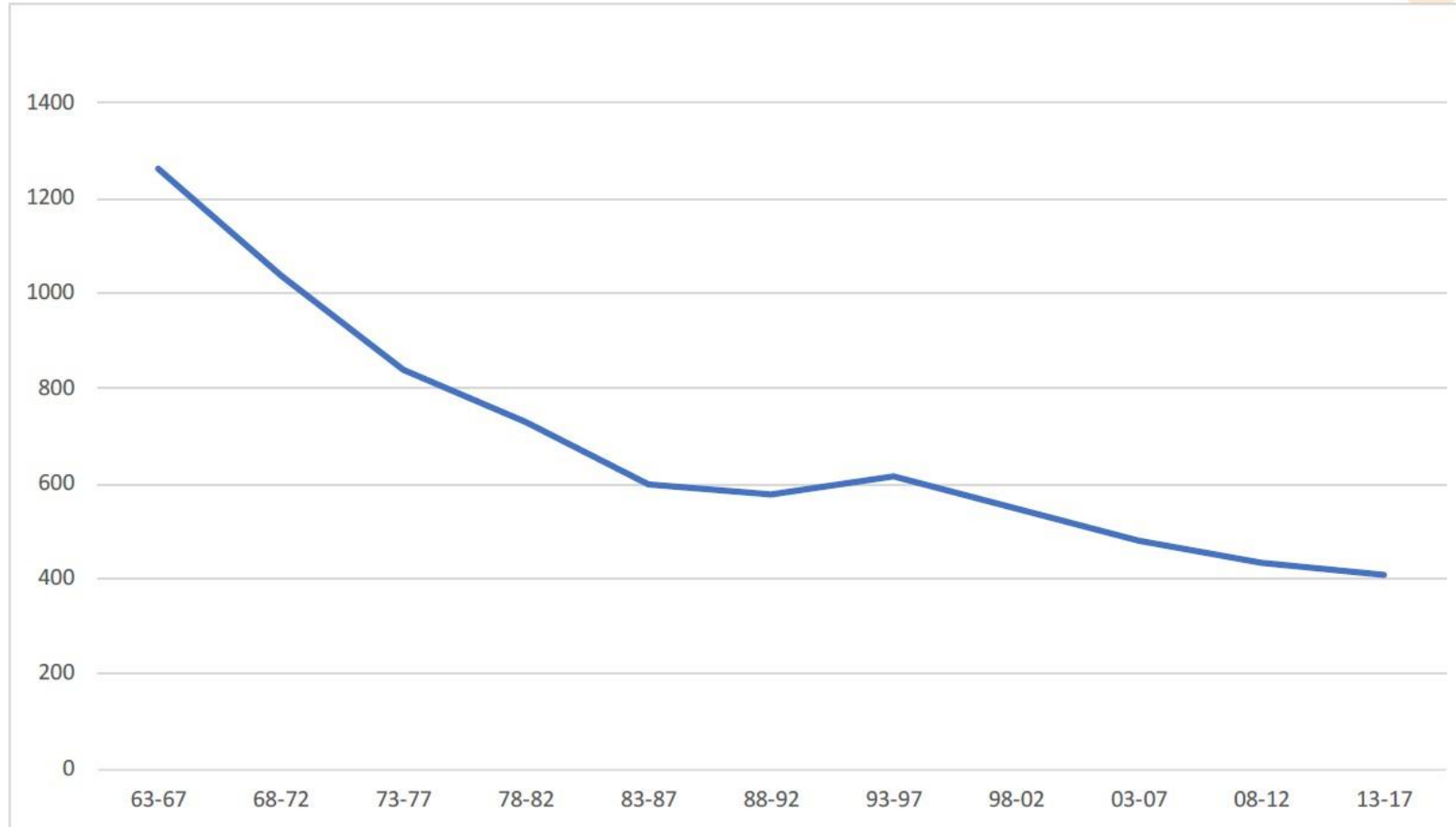
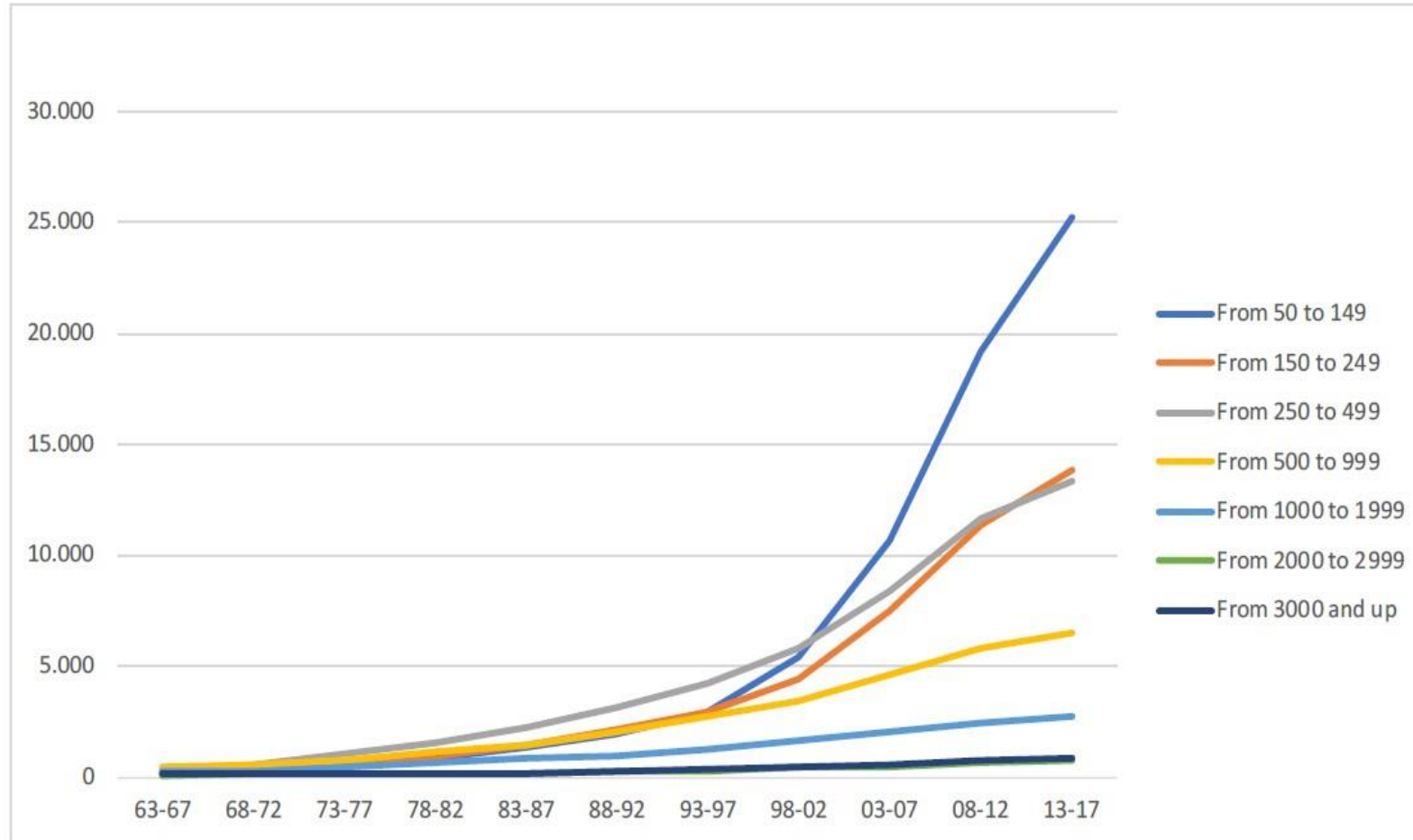
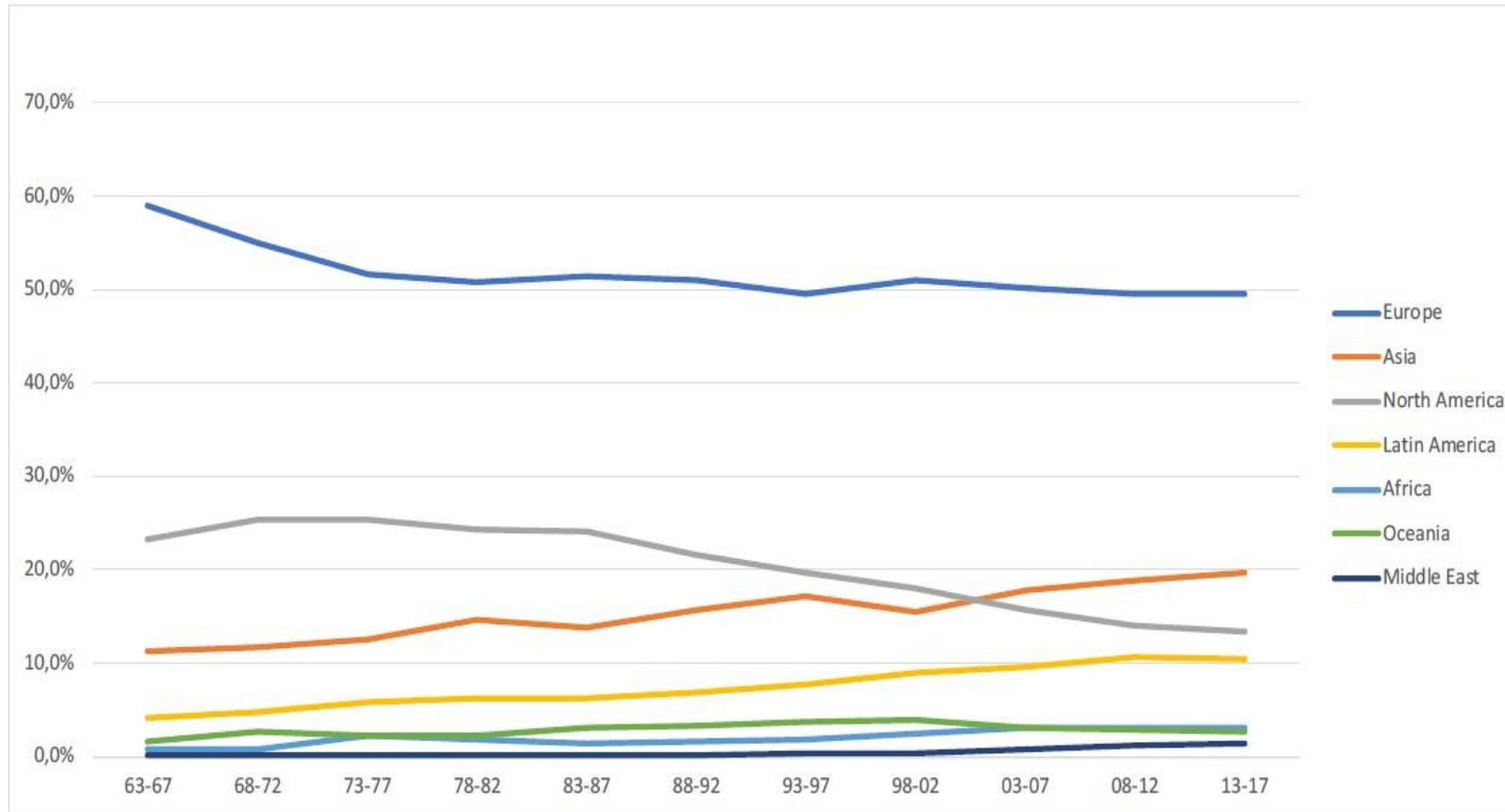


Figure 4: Average number of participants

7. Participant categories



9. Estimated total number of participants per region



13. Subjects

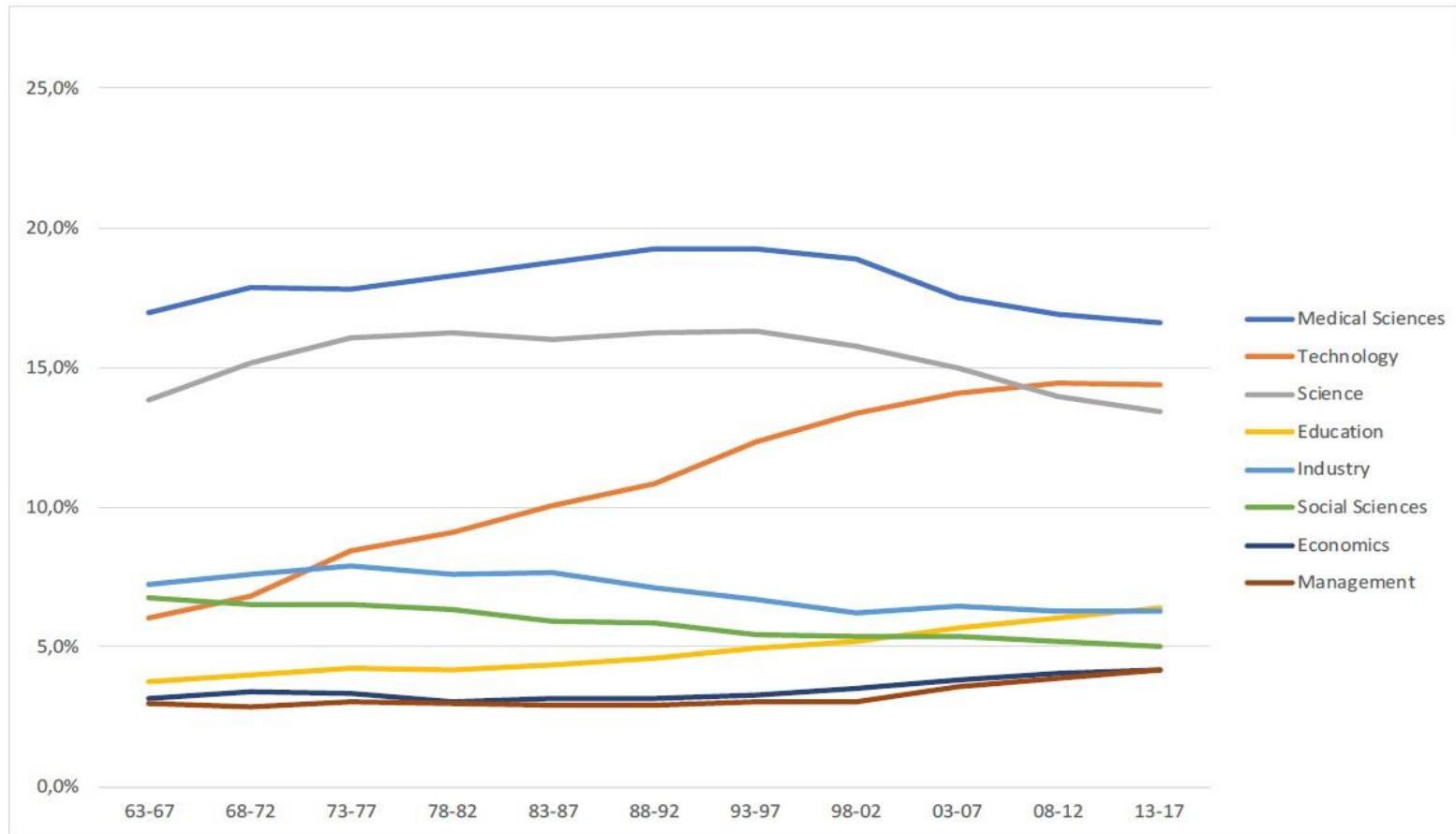


Figure 6: Subject matters by relative number of meetings

14. Type of venue

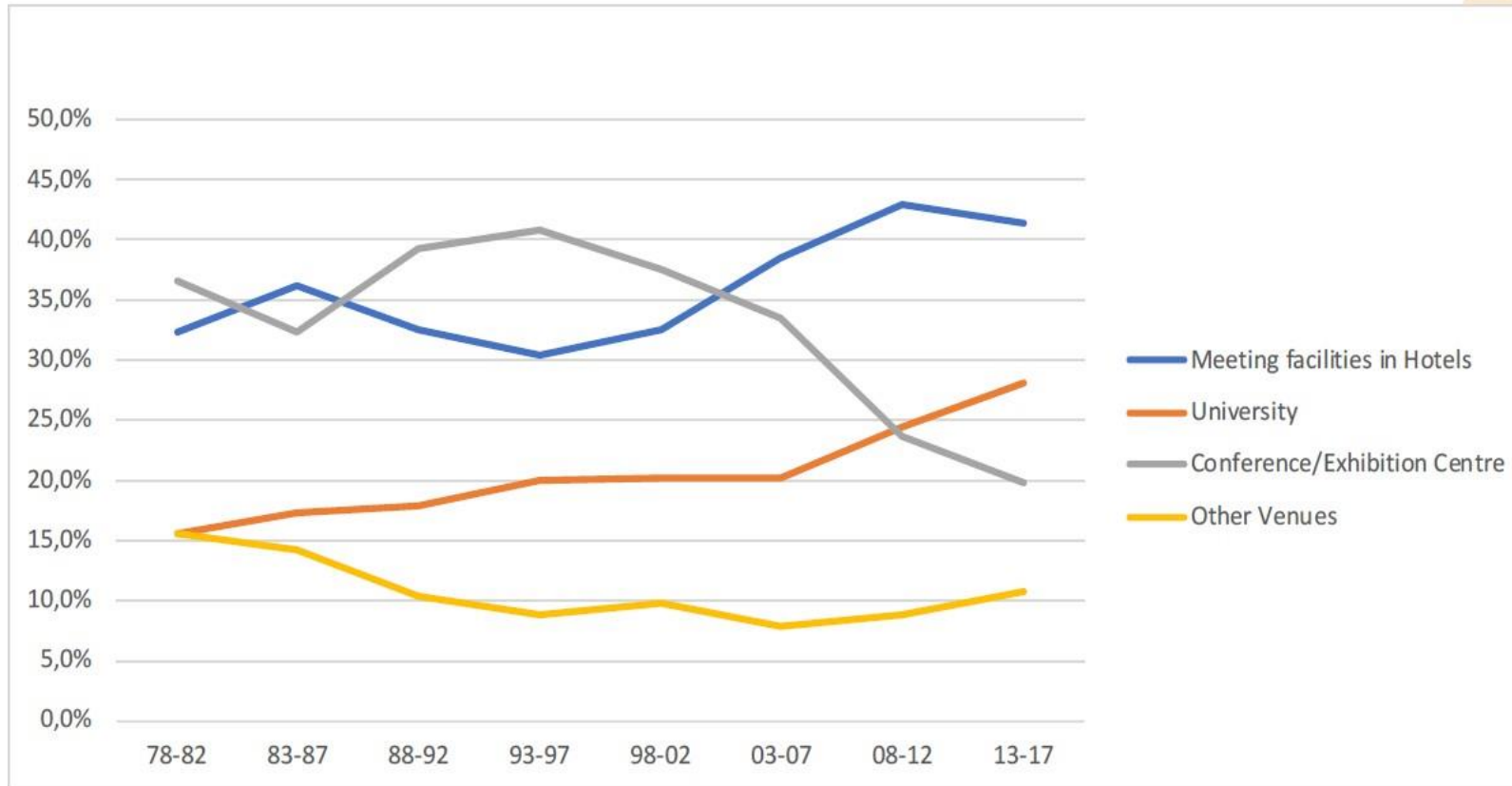


Figure 7: Type of venues used for international association meetings

15. Average length of meetings in days

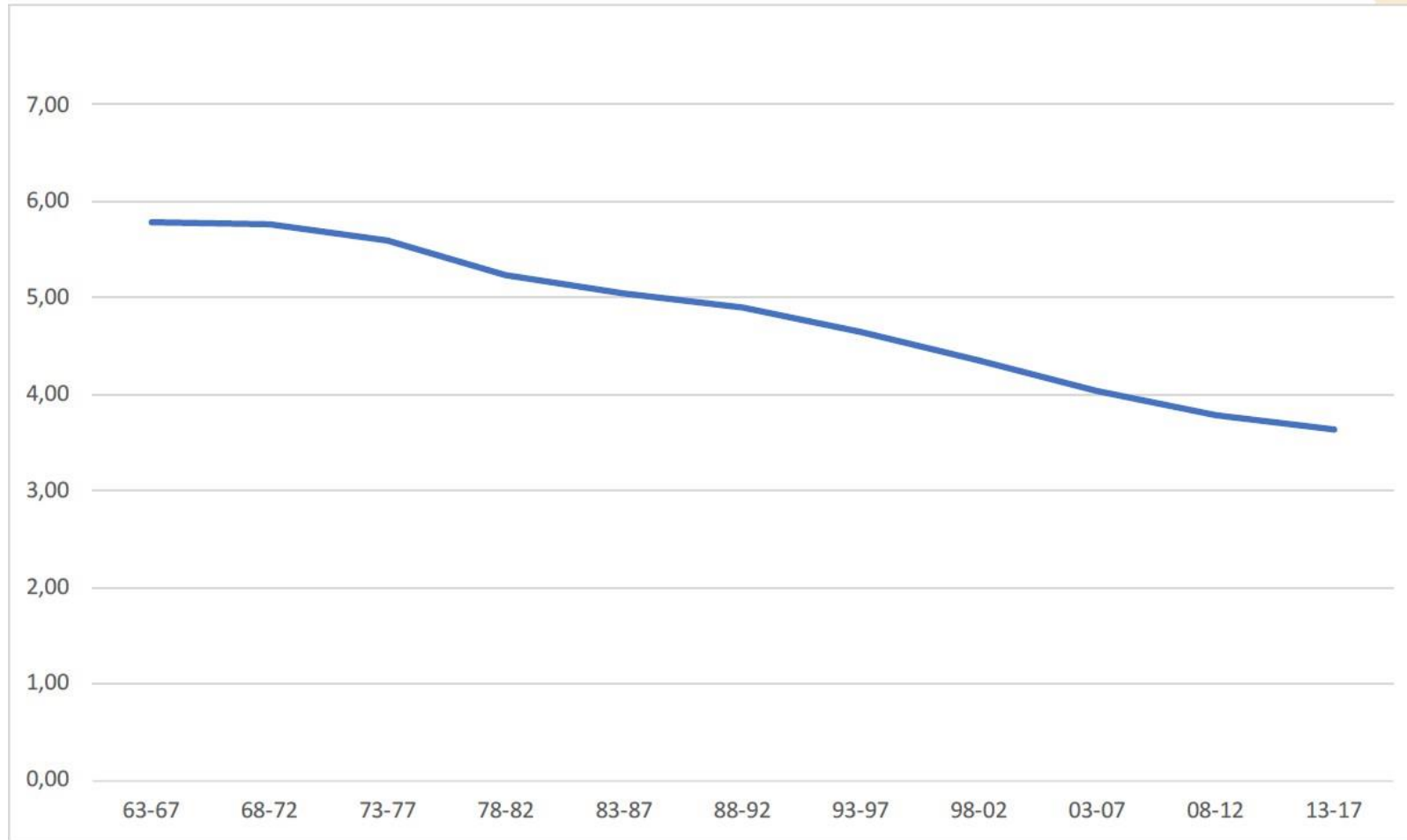


Figure 8: Average length of meetings in days

summary

Exponential growth trend in the number of international association meetings continues

Europe remains the most popular region for meetings, Asia most growing

Most popular countries and cities change in five-year period

Average number of participants per meetings decreases

As meetings get smaller, the overall number of participants rises

Regional rotation a growing trend

Technological meetings grow

Universities becomes a popular venue choice

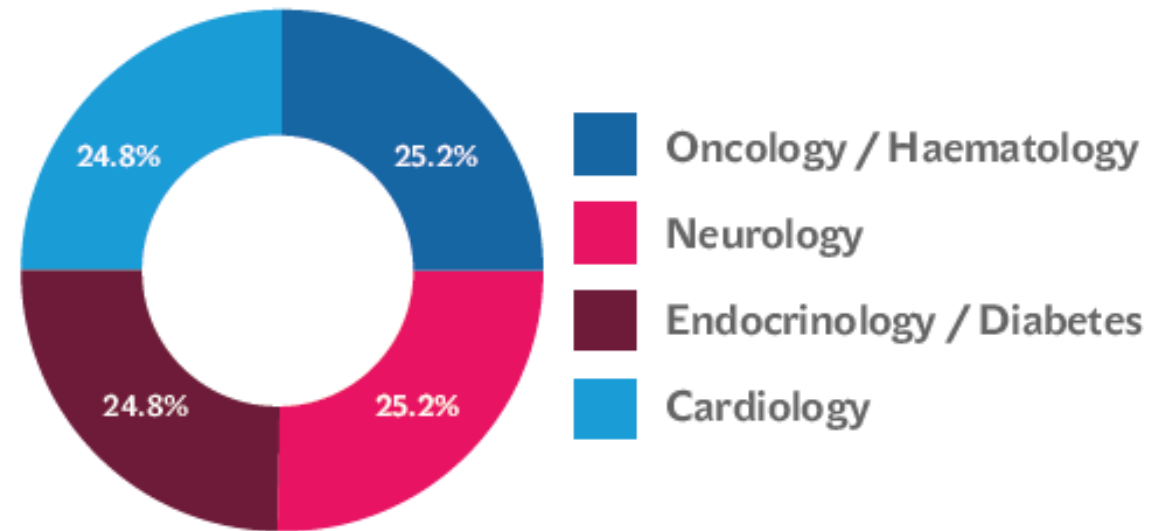
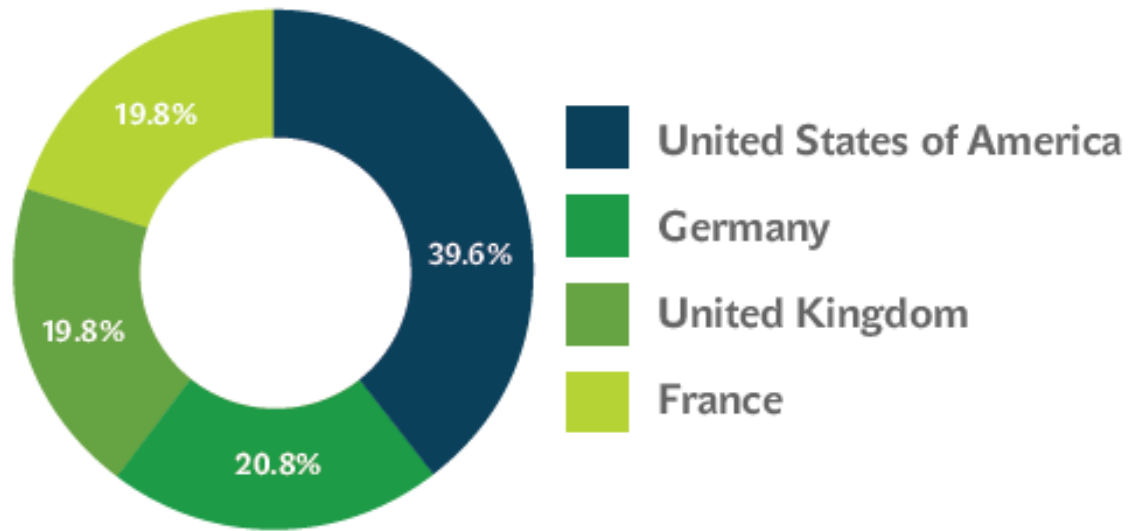
Duration of meetings getting shorter



THE **SCIENCE** OF **HEALTHCARE** **CONGRESSES**

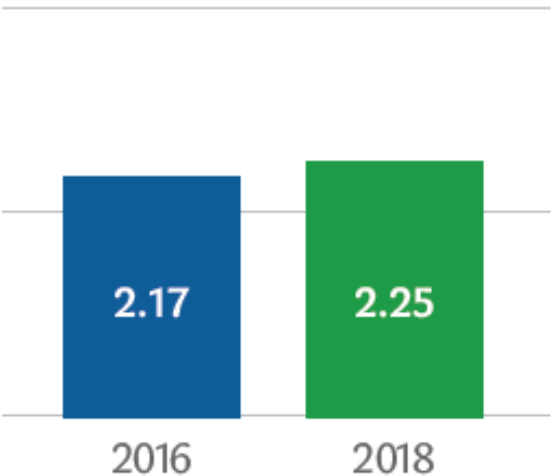
Physicians surveyed:

Average years practicing 17 | N= 202

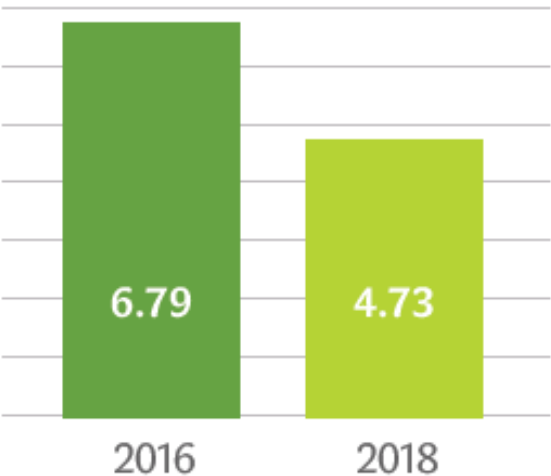


2016 and 2018 findings regarding meeting and travel duration preferences

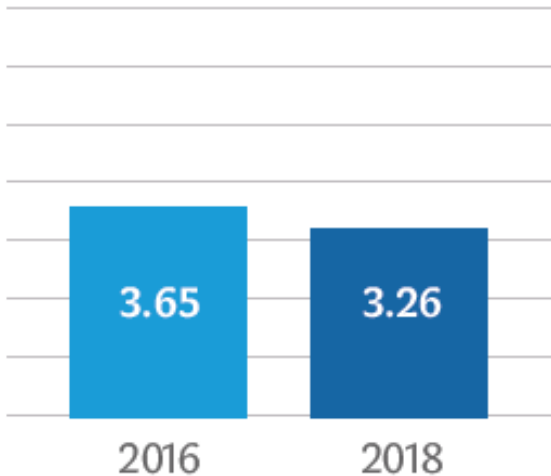
Ideal meeting length (in days)



Maximum number of hours willing to travel (average)



Maximum number of days away from the office (average)



(2016 and 2018 white papers)

HCP MOTIVATIONS FOR ATTENDING MEETINGS



*Participants could select more than one answer (Base: 237)

Find out about the latest scientific content for my disease specialty

85%

Listen to talks about already known scientific content

54%

Network with colleagues/ other disease specialists

72%

Meet with global/local experts or Key Opinion Leaders

76%

Have exposure to a wide range of content

54%

Have some time away from medical practice

26%

To visit a new city or location

29%

Meet with pharma scientific representatives on their booths (where relevant)

22%


Hear the latest products in development for my disease area

74%

Our 2019 data reveals that HCPs deem congresses to be of paramount importance to their medical education. They have attended 8.4 congresses on average (a blend of national and international) over a 24-month period.

Commitment to attending scientific congresses remains steadfast amongst this group of HCPs. 41% of physicians state that their attendance at congresses has increased over the past 5 years, with 51% saying it has stayed the same.

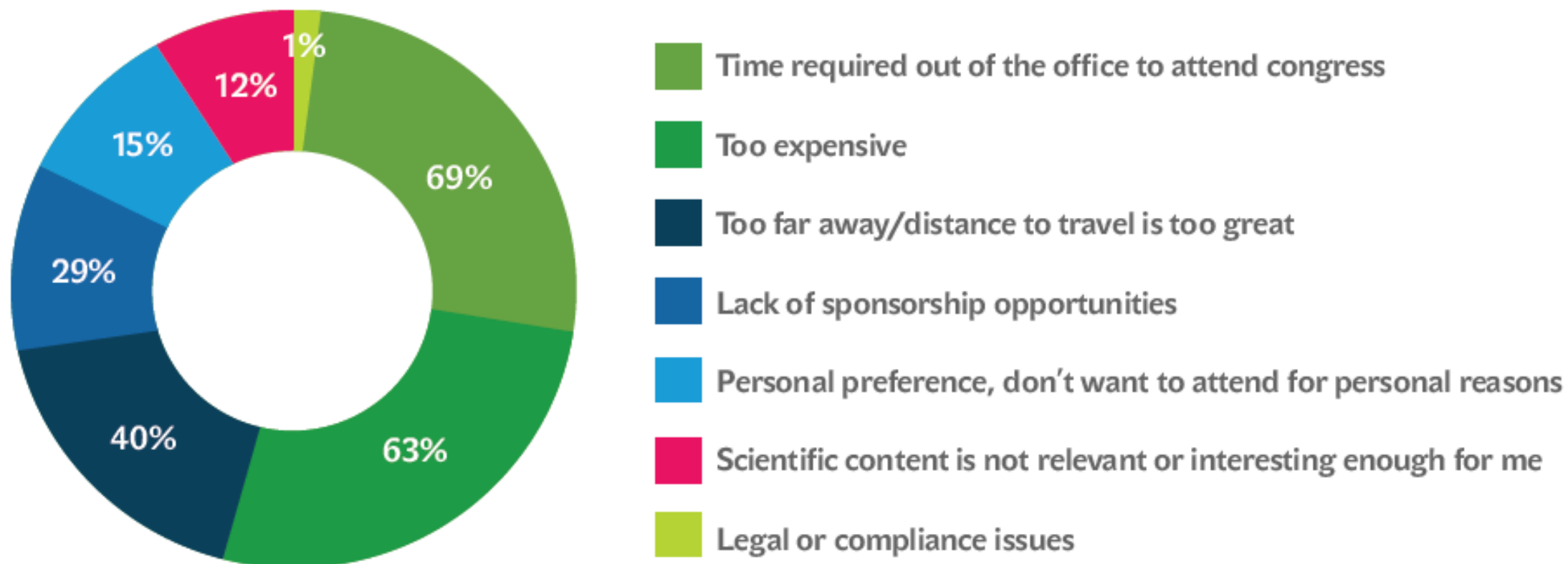
Our survey asked physicians, "What are their primary reasons for attending a congress?" 90% of HCPs attend to find out the latest scientific content. 80% state an opportunity to hear about the latest products. 73% cite the ability to broaden their peer network.



"Congress enable a group of highly committed professionals to interact with each other and exchange information in an efficient and engaging manner."

Neurologist, United Kingdom

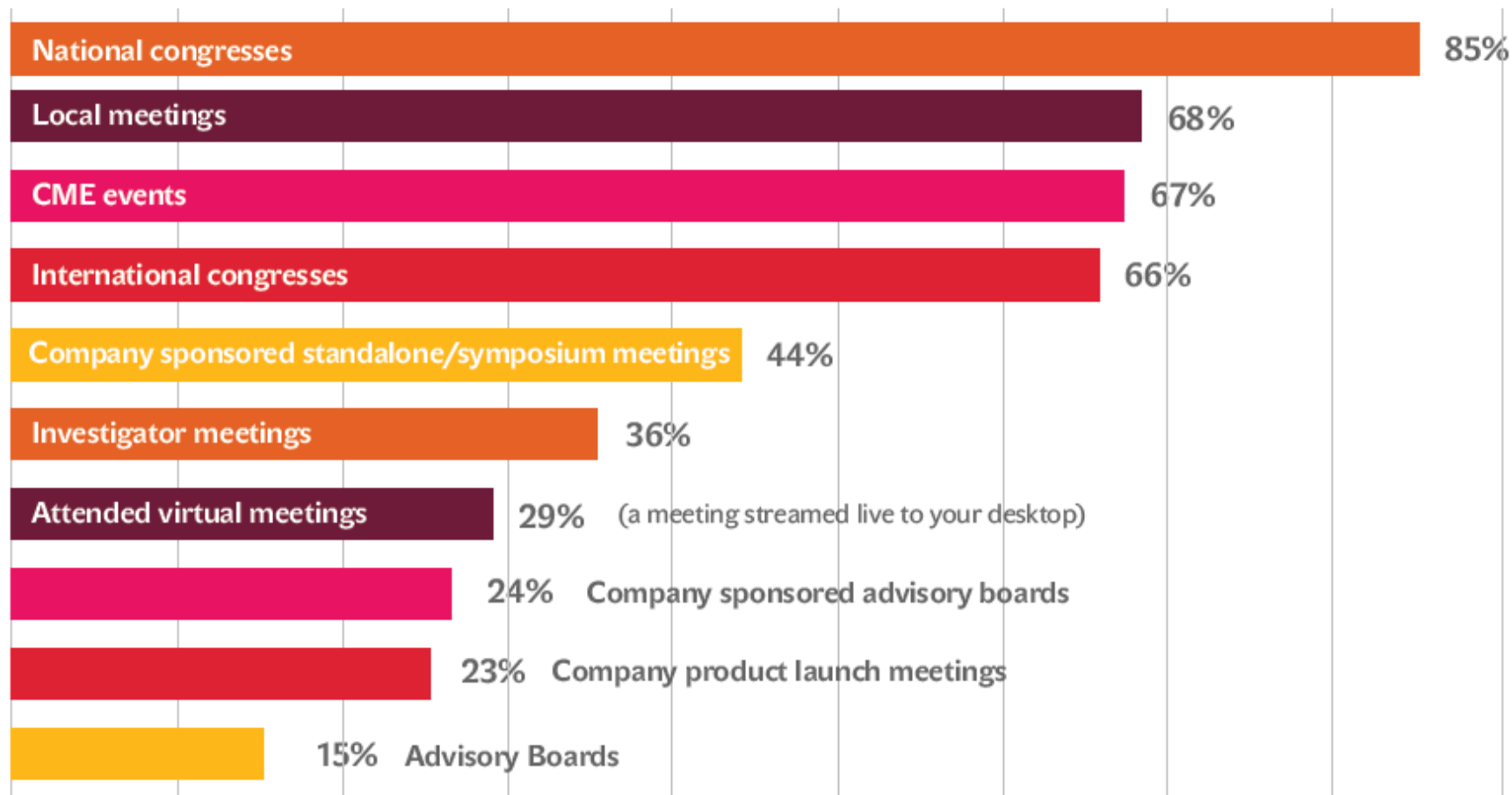
Factors that limit the congress attendance of non-participating physicians



In addition to what factors limit their attendance, we asked non-participating physicians 'If congresses were accessible online or as virtual meetings, would you be more likely to attend?' 78% cite that they are more likely to attend as a virtual delegate.

Participating physicians attendance at medical programmes in the past 12 months

*Yearly participation levels for all medical education



HCPs place the greatest educational value on international congresses, with 85% of physicians favouring them above national congresses. Yet, of the meeting types actually attended in the past 12 months, national congresses are first, with local meetings second and international congresses fourth. Physicians are placing a strong emphasis on assessing the educational value of a congress programme, with 95% conducting a personal assessment before committing to attendance.

Physicians' key deliverables expected from congress attendance are:

"Have I established new contacts?"

Endocrinologist / Diabetes Specialist, Germany

"Has what I learned changed my thinking / changed my practice?"

Oncologist / Haematologist, United Kingdom

"Did I learn clinical facts that I can use to help my patients?"

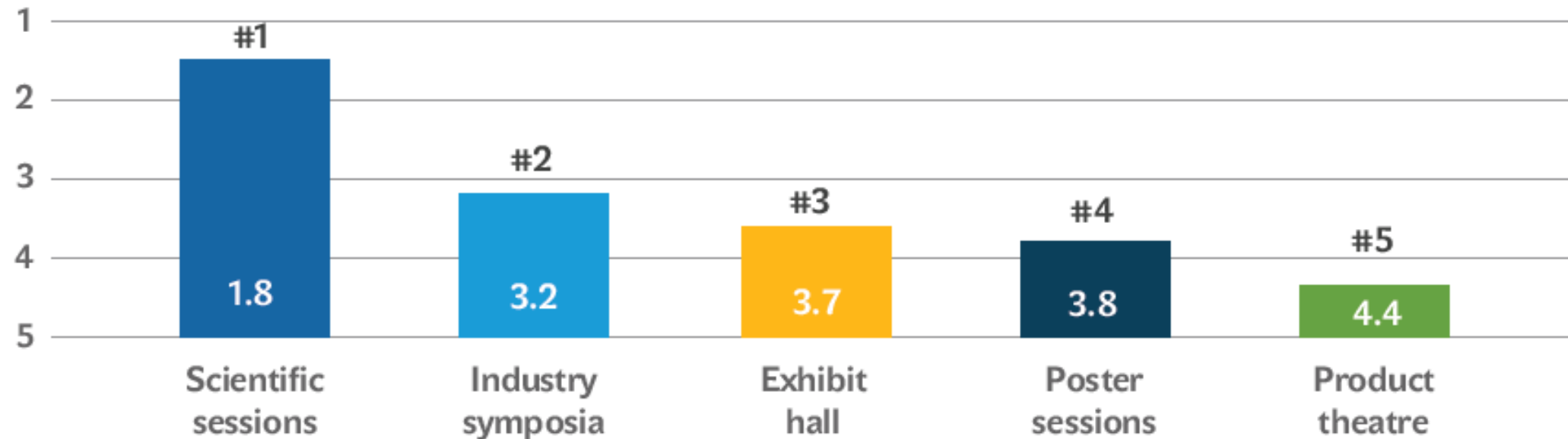
Cardiologist, United Kingdom

"Was there a tangible benefit such as a clinical trial, I can become involved in?"

Oncologist / Haematologist, United States

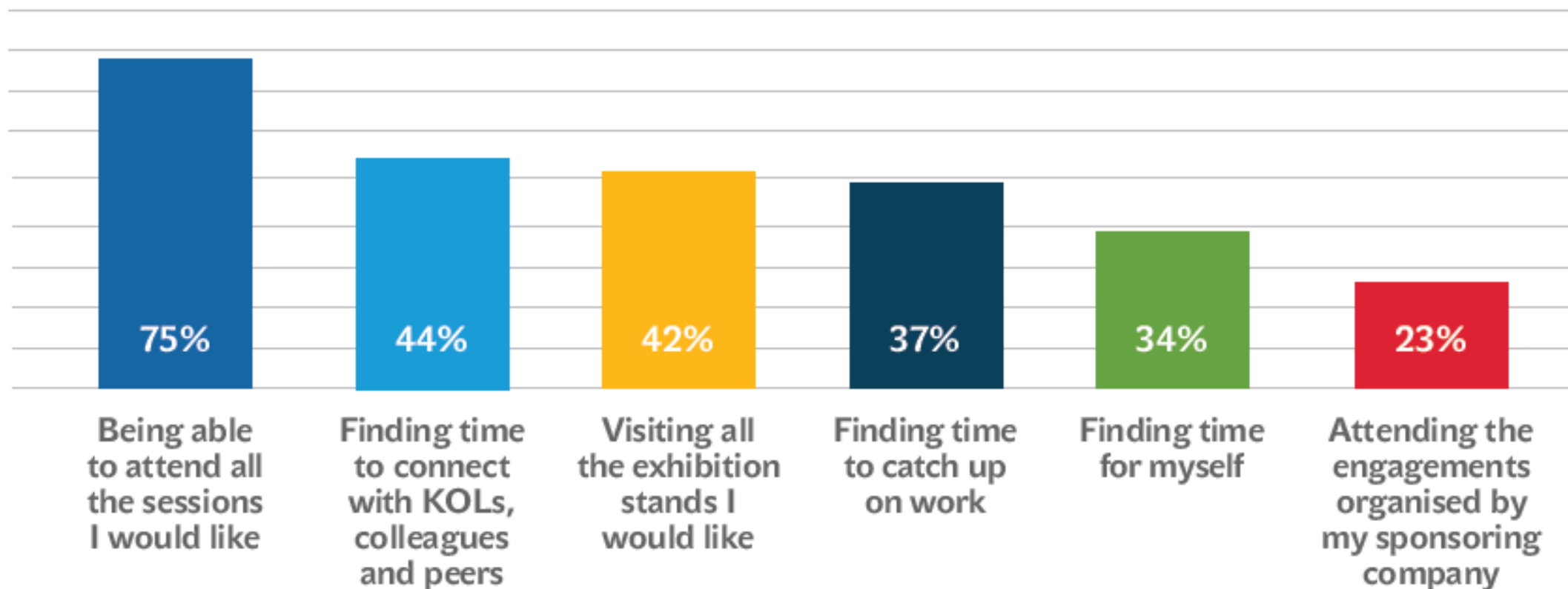
Congress elements based on educational value ranked in order of importance

(1 is the most important 5 is the least important)



The graph above shows the average importance ranking per congress element.

Top three challenges you find in balancing your time when attending a congress:



Failure to plan or prepare effectively can often result in an HCP's experience being less than positive, which may ultimately influence future decision to attend – as previously noted, 71% make choices based on *previous experiences*.

The Science of Healthcare Congresses data suggests the importance of a defined congress strategy and programme of activities that delivers high-quality, customer-centric, medical education.

By delivering a congress strategy, that puts the physician at its core can only benefit the healthcare professional, Industry and most importantly patients.

Conclusions