



MEETINGS & EVENTS

ON THE HORIZON

Healthcare Congress Trends to Watch



For the pharmaceutical and healthcare industries, compliance and regulation are a way of life. In this already complex environment, the ever-changing regulatory landscape has increased the pressure over recent years. The introduction of stringent Transfer of Value (ToV) reporting requirements and other new regulations that vary across the globe are pushing industry stakeholders to evaluate how to adapt and thrive in this environment.

These dynamics are having a profound effect on healthcare congresses, which represent the largest segment of educational meetings. The future of these events depends on the ability to grow attendance and effectively engage with Healthcare Providers (HCPs). To better understand the key trends shaping the future of healthcare congresses, American Express Meetings & Events surveyed 124 healthcare planners, congress organizers, and meeting suppliers, and conducted in-depth interviews with 12 industry experts.

More than 80% of the professionals surveyed and all of those interviewed for this project agree that in the next decade healthcare congresses will undergo major changes. Competition for the healthcare provider's time is increasing as more groups issue meetings invitations. Patient groups, online education programs, and specialist groups within larger societies are all vying for attendees, while HCPs increasingly choose to spend less time away from the office. Additionally, in some cases the current socio-political environment is impacting HCPs ability and desire to travel to certain destinations. These dynamics and others will inevitably impact how societies and associations plan and execute congresses.



So Many Congresses... So Little Time

Healthcare providers benefit from the opportunity to network and learn at congresses. However, HCPs are not time rich; many are focused on growing their practices and managing the rising healthcare needs of an aging population. Furthermore, congress attendance for HCPs has, for many years, been funded by healthcare companies. This may no longer be the case. Changes to this model are underway and HCPs increasingly may need to fund their own attendance.

HCPs, therefore, must compare the return on investment associated with attending an event against the cost of being away from the day-to-day running of the business. In smaller practices and hospital groups, HCPs are now more selective, attending fewer congresses less frequently. In some cases, group medical practices require HCPs to rotate attendance. According to the American Express Meetings & Events 2016 Doctor's Orders study, physicians are invited to attend a considerable number of meetings each year. They received, on average, 16 meeting invitations in 2015 and attended around 50% of those. Congresses were the third most-attended meeting type.

In addition to time pressures, a shift in the funding model is also taking place. In 2017, Med Tech Europe issued an updated code of ethical business practices that will prohibit member

organizations from sponsoring HCPs at congresses. In the US, congress sponsorship is currently less regulated, but ToV reporting requirements and meal caps are keeping tight reigns on HCP spending levels. Additionally, many organizations, particularly medical device companies, are having to submit educational grants and may choose not to fund HCP attendance because the requirements are difficult to manage. As a consequence, more HCPs either have to fund their own attendance or rely on being selected as a recipient of grants made available to clinics/hospitals. Lisa McKenzie, VP, Healthcare and Pharmaceutical, American Express Meetings & Events advises, "Changes in direct HCP sponsorship could be a pivotal moment for congresses and their key stakeholders. The healthcare industry and its partners must work together to create a path forward, with a focus on increasing value for HCPs by delivering an exceptional congress experience."

To stem a potential decrease based on the influences noted above, congress organizers will need to focus on creating clear value stories and measureable return for HCP attendance where possible to help physicians see the value and make the case for attending. In the long run, if congresses are able to articulate and demonstrate their value they will have a better likelihood of attracting HCPs.

In the future, congresses will need to work harder to demonstrate ROI and provide compelling reasons for HCPs to attend. Healthcare exhibitors will also need to monitor funding regulations and adapt congress tactics accordingly to ensure they remain front and center for HCPs.

Shake Up the Learning Environment

With many medical meetings being held each year it can be a challenge for organizers to offer fresh and compelling content at each event. Three quarters of meeting professionals agree there is increasing pressure to find new ways to deliver education to healthcare providers. This may ultimately benefit the industry, as forward-thinking congress organizers are making focused efforts to engage HCPs with new, more engaging learning experiences. When asked about new learning experiences that could help congresses stay relevant for the future, industry professionals would choose more time for hands-on learning experiences and interactive sessions.

The 2017 American Academy of Orthopaedic Surgeons (AAOS) annual conference is a good example of an association making progress in this area. The AAOS conference website promotes BioSkills sessions that provide exhibitors with offsite facilities and standard equipment for live demonstrations of procedures. The conference is also facilitating

audience interaction with ask-the-expert sessions where attendees present cases for diagnosis and recommendations. These types of sessions can help congresses ensure content is tailored and relevant.

Meeting space design is another area where societies can shake up tired learning environments. Moving beyond panel presentations and theater style seminars, innovative associations are focusing on ways to disrupt the attendee experience. For example, one society places stationary bicycles in breakout rooms to keep attendees alert. Johnnie White, Sr. Director, Education & Meetings American Academy of Otolaryngology, is already giving thought to how he can provide compelling experiences, but notes cost plays a role. His list of options to explore includes holding seminars in a “theater in the round” to promote audience engagement with the speaker, or mixing in couches in some breakouts to provide a more relaxed setting.



Congress organizers will have to up their game to get their event at the top of HCP's “must attend” list.



Delivering for the Discerning Attendee

Many HCPs are accustomed to high-end experiences and have great expectations for service and quality – from food and beverage experiences to being given the VIP loyalty treatment they’ve earned from a preferred hotel brand. Congress organizers and sponsoring pharmaceutical organizations will continue to see pressure to provide excellent experiences for their attendees. However this can be at odds with meal caps and data transfer requirements.

Even within these constraints, hotels remain eager to ensure loyalty members feel rewarded for their business. Julie Hills, Hilton Worldwide Sales, suggests that improving the rooming data collected at registration and sharing more information with the hotels could help improve the on-property experience for attendees. “For example, understanding which rewards members are on site and how many are sponsored by our meeting clients would make strides toward us offering the type of experience that is expected by these guests,” says Hills. Losing out on an opportunity to earn additional loyalty points or not receiving the expected VIP hotel treatment can be a significant miss with HCPs.

For the society or association, working to provide a quality experience within the meal cap limits provides another layer of complexities. Hotels also want to present the best possible food and beverage options and are getting creative to make the most of limited budgets. Many times the chef will be a part of the process – recommending local, less expensive options or capitalizing on the menus of other events the same week to offer a lower price point. Highly localized cuisine also has the benefit of offering a sense of place, something many travelers value.

Even though congress organizers ultimately control food and beverage options and housing management, in the minds of the attendees, the hotel brand is still providing the experience. When planning ancillary special events, healthcare exhibitors must also be mindful of congress rules and remain flexible to ensure a memorable brand experience.

Embrace the Future

The new generation of physicians grew up in a digital, hyper-connected world. Congresses must rethink how they can best engage this segment of HCP congress attendees. Of those surveyed, 80% agreed that the growing number of next generation healthcare providers will drive substantial change in attendee engagement strategies. Tech-savvy and raised on social media, the newest HCPs and medical students require a different learning environment than more traditional HCP audiences. Forward-thinking congress organizers should proactively seek this next generation of HCPs to act as advisers, inviting them to serve on congress boards.

Additionally, there is some concern that the next generations of physicians may simply place a lower value on face-to-face meetings. Congress organizers are approaching this challenge in two ways: more online learning and more interactive learning - not to replace the congress, but to supplement it. Johnnie White, Sr. Director, Education & Meetings American Academy of Otolaryngology, believes that face-to-face will always be the preferred method for education, but younger HCPs also want 24-hour on-demand learning options. White explains, "After conducting focus groups with younger HCPs, we created an interactive online learning management system that actually responds to users' selections and then

branches to allow them to create their own learning path. We have had a very positive response."

Some societies are enhancing congress agendas to provide targeted experiences for younger physicians. The European Society of Cardiology offers reduced congress rates for those 35 and under in addition to developing special programs for that group. Its Young Investigators Award provides the opportunity for those 35 and under to compete for best original research. They also offer speed mentoring sessions to give future generations 20 minutes to meet with leaders in their specialty. These types of programs provide enhanced value in a face-to-face setting to keep the next generation engaged and interested in these events.

Cara Banasch of the New Orleans Convention and Visitors Bureau suggests there is a need for host cities to be better at asking questions and being thoughtful listeners – getting beyond the basics of rates, dates, and space. With the mix of demographics coming to congresses, she noted there is an opportunity to be more creative. Asking questions in advance can help them come up with unique options, like using pre-function space for first-time attendee networking or integrating local experiences into breaks to give a stronger sense of place.

The future of congresses largely lies in the hands of today's emerging leaders. Capturing the attention of this tech savvy, social media savvy, audience will ensure they see the value in face-to-face meetings.

Surgical Use of Technology

It's not just the next generation of attendees looking for technology to be incorporated into meeting experiences. Effective use of technology can be a major advantage for savvy congress organizers.

Technology discussions for meetings often go right to the ubiquitous mobile app. Simple app functionality like maps and session agendas are a base expectation. Many physicians are looking to mobile apps to help them make better use of valuable networking time, connect them with other attendees who share interests or challenges, or give them the ability to connect with leaders in their specialties while at a congress.

Beyond meeting apps, technology is enabling alternatives to in-person attendance for physicians who cannot be on site. A global congress manager from a large pharmaceutical company predicts satellite broadcasting and virtual components are going to be increasingly important for sharing knowledge with less accessible regions and to allow additional

delegates at low expenses to join, but organizations must also consider cultural factors. She gave the example, "In the Middle East, face-to-face interaction is a cultural requirement. Virtual meetings can be applied but in a different format."

The role of augmented reality and "smart badge" technologies in future meetings must also be considered. These technologies are making their way into the medical space; Congresses have an opportunity to embrace and incorporate them into the experiences they provide. Creating immersive experiences on the exhibit floor or in education can make congresses stand out. And utilizing apps and badges that enhance ToV tracking with minimal disruption can deliver value for sponsors and attendees. Furthermore, if less and less HCPs are sponsored congress attendees, healthcare companies will need to adopt new strategies to make meaningful and lasting connections onsite. New technologies could help facilitate new ways for companies to interact with HCPs.



Congresses should evaluate the technology they are using today to address attendee and exhibitor needs and deliver on meeting expectations. At the same time, thinking ahead five years and creating a plan to incorporate new technologies can make an association's congress stand out in the crowd.

Data Before, During, and After

Big data is a hot topic and that holds true for congresses. In fact, 77% of those surveyed agree that in the coming years, congress organizers and exhibitors that leverage data to create engaging attendee experiences will have a significant advantage. Associations and exhibitors have a lot to gain both in compliance and attendee experience if they work together to better collect and use data before, during, and after the event.

67% of respondents claim their organization is fully leveraging data to deliver engaging attendee experiences, yet the highest reported data use was for registration data, with only 58% saying they utilize this data to design and plan congresses. The use of other data sources decreases from there with fewer than half of survey respondents leveraging any single method –post-event surveys (48%), pre-event surveys (35%), and mobile app data (29%).

The least leveraged data is booth traffic (17%), which may attest to the need for more innovative use of technology in the exhibit hall. Some associations are on the forefront – using Bluetooth to monitor booth traffic in real-time and using communication tools, like a mobile app, to drive traffic to under-visited areas.

But one of the largest motivators for pharmaceutical and healthcare companies to leverage data is compliance. Lawrence Coburn, CEO, DoubleDutch, believes 100% compliance is possible and will soon be within reach if congress organizers can conquer 100% adoption of technology. In the future, developments in machine learning will offer new ways to analyze data and adds, “Pharmas - you have an obligation to collect the data. Your future self will thank you.”



Data is a critical component to better understanding and delivering on attendee expectations and better compliance. Congress organizers and exhibitors should take the time to review the data they already have, and decide what information is important to collect going forward to support their strategy.



Innovative congresses understand that personalized experiences = engaged attendees and happy sponsors.

Getting Personal

Personalization has become an expectation in the meetings industry, yet only 44% of those surveyed indicated they use data to engage attendees during their events with personalized communications and content. Of course, personalization is based on information and data sharing, which immediately leads to a discussion of privacy. Congress organizers need to keep a close eye on the demand for personalization and work to incorporate personalization and customization options into their events to stay relevant to their attendees – without violating expectations of privacy.

Personalization options begin before the meeting via registration and mobile apps. Collecting useful and relevant data that allows attendees to share their view of what is valuable, means the onsite experience can deliver on what the HCP is looking to get from their attendance. Caroline Mackenzie, Director, Global Association Partners LLP, observes, “With new regulations on HCP interaction, pharmaceutical companies are working harder to get in front of HCPs at the right time, with the right method, and the right message. In general, audience expectations are being taken more seriously and will lead to improvements in the industry.”

During the congress, a well-designed mobile app can provide recommendations to attendees based on real-time behavior. For example, when an HCP gives a high rating to an attended session, the mobile app can immediately recommend other sessions that might be of interest to that attendee. The goal is to ensure the attendees feel their time away from their patients was well spent.

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