

A report from the IMEX Policy Forum 2018

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Overview:

The IMEX Policy Forum (formerly Politicians Forum) featured significant changes in format in an ongoing bid to optimise interactions between government representatives and industry leaders and to make outcomes clearer and more actionable.

The 2018 Policy Forum programme included four key parts:

1. An advance **discussion group of national level government representatives** addressing policy issues relevant to the meetings industry
2. A corresponding advance **discussion workshop** for local/regional government representatives to explore **the evolution of cities in the meetings industry**
3. An **opening presentation to the Forum** from Gloria Guevara Manzo, President & CEO, World Tourism and Travel Council (WTTC) on how the WTTC views primary travel-related issues impacting the meetings industry
4. An **Open Forum featuring a panel of industry leaders** addressing current industry concerns, initiatives and issues raised by government representatives, with feedback from those government representatives. The Open Forum was described by global urban development advisor Prof. Greg Clark CBE of The Business of Cities as a way of characterising wider government/industry interaction, and of showing how this could be used to mutual advantage.

These key parts were enhanced by two additional activities:

- **A presentation at the IMEX Opening Ceremony**, from Gloria Guevara Manzo that engaged the broader IMEX audience in key issues to be discussed at the Policy Forum in the afternoon.
- **A tour of the IMEX show floor** which demonstrated to visiting government representatives the scale and diversity of the industry, and how their respective cities and countries present themselves to a global market.

Proceedings:

1. National Government Discussion

Chaired by ICCA President Nina Freysen-Pretorius. An overview of the discussion topics followed by two facilitated round table discussions and reports back on findings to the group:



Creation of a national meeting strategy, including:

- How can a national meetings industry strategy best be developed?
- What models have been given consideration?
- How can such a strategy be refined to align it to the economic development goals of a country?
- How can a meetings industry infrastructure or ecosystem be advanced to support this?

Defining legacies of the meetings industry:


- How can legacy be best defined?
- How can long-lasting legacies be better assured from meetings and events?
- How can such legacies be measured?
- How can success stories be better shared and used?

Conclusions:

Creation of a national meeting strategy:

- The importance of the broader role meetings and events can play in policy advancement
- The need for an integrated approach to avoid conflicts with other areas of government policy and regulation, and to optimise potential synergies
- The overarching importance of consultation with local government as the front line for much industry activity
- The role of immigration, taxation and security policies in supporting a meetings strategy

Defining legacies:

- The need to recognise the wide diversity of legacies and the roles played by both hosts and organisers in identifying and delivering them
 - The social importance of legacies (including medical supplies and facilities as well as simply knowledge transfer)
 - The need to accept the challenges of quantifying the long-term values of legacies without disregarding these incremental values
 - The importance of documenting and communicating a range of legacy examples in a relatable form for others to use
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2. The Evolution of Cities in the Meetings Industry Workshop:

Chaired by John Greenway and facilitated by Greg Clark the workshop explored the evolution of cities in the meetings industry. Greg Clark outlined the stages of city development and how this creates changing needs and opportunities for engagement with the meetings industry. He highlighted:

- That cities are in the midst of a 100-year cycle of urbanisation characterised by four major trends:
 - Global urbanisation
 - Peak population and stabilisation
 - Climate change
 - Exponential technology
- That cities develop a DNA based on their history and characteristics. What shapes cities in the next 30 years will have far-reaching impacts on their future performance and prospects
- That in a business context, cities are seeing six major trends:
 - Cities are emerging markets for businesses
 - Businesses are (re)urbanising
 - The urbanisation of capital
 - The rise of tradable urban services
 - Cities are hubs of business and cluster innovation
 - Businesses rebranding and restructuring to meet city goals
- That geopolitical, technical and social disruptive forces have potential for both challenge and opportunity in the city development context
- That four new economies – the sharing economy, the circular economy, the experience economy and the innovation economy – are driving urban restructuring in many respects. Supported and influenced by knowledge exchange facilitated by the meetings industry

These points were illustrated by case studies from six major cities showing various stages of their evolution and development of their meetings business:

- **Sydney**
 - Meetings evolution started 1969
 - 1988 SECC Darling Harbour
 - 2014 and 2017 Building for the Future
 - New ICC opened December 2016



- **Singapore**
 - 1972 hosted first international congress – 5th Asia Pacific Congress of Cardiology
 - 1974 Singapore Convention Bureau founded
 - 1995 Suntec Convention & Exhibition Centre opened
 - 2005 start of industry cluster approach for the meetings industry
 - 2009 hosted APEC Summit
 - 2017 Top Convention City in Asia for 16th consecutive year (ICCA)
- **Dubai**
 - Developed since 1960 – Dubai International Airport
 - 1966 oil discovered
 - 1979 Dubai International Convention & Exhibition Centre
 - 2003 Dubai Business Events
 - 2015 Dubai is world's 4th most visited city
 - 2016 Dubai in world's top 10 convention cities
 - now only 5% of income from oil
- **Tel Aviv**
 - CVB only founded January 2018
 - High-tech entrepreneur innovation is a key area/Russian immigrants/new talent
 - supportive mayor in post for last 20 years
- **Cape Town**
 - colonial period (19th century) and apartheid age (1948 - late 1980s)/sanctions
 - major city development from 1994/landmark events of Rugby World Cup 1995 and 2010 FIFA World Cup
 - CTICC 2003, CTCVB 2010, national CVB 2012
 - knowledge economy 2015/ medical technology development (e.g. for the prevention and treatment of AIDS)
- **Barcelona**
 - four major events in the city have created lasting infrastructure legacies, supported by leadership from mayors:
 - 1888 the Great Exhibition placed city on the world map and created facilities
 - 1929 the International Exhibition led to technology and transport advances including airport and metro

- 1992 Olympic Games opens city to sea front with more new buildings
- 2004 Universal Forum of Cultures development of the technology district and infrastructure

3. The Open Forum and discussion

Government representatives joined with a wider group of industry leaders for an opening presentation, open discussion and conclusion.

The opening presentation:

Delivered by Gloria Guevara Manzo who focussed on the top three challenges she sees facing the travel and tourism sector, from a recent survey of WTCC members:

- **Security and safety** (identified as a key issue by 78% of members):

Travel and tourism has great potential for growth, with potential for millions of new jobs to be created in G20 countries - if industry organisations work collectively with governments to minimise repetitive identity and document checking, citing an increased use of biometrics as a potential solution.

- **Crisis preparation** (identified as a key issue by 72% of members):

The increasing and widespread occurrence of a range of crises is a critical inhibitor of travel. This is no longer limited to a few high risk destinations but is a matter of “not if but when” for destinations worldwide.


- **Sustainability** (identified as a key issue by 67% of members)

There is a need for a PPC (private, public, community) approach. Communities needed to be supportive of industry development. Issues around the future of work are an important new concern in community relations, with employment being vulnerable to new technology and trends. If the meetings industry is to attract more attention from politicians it needs to talk more about employment.

The Open Forum exchange:

The exchange followed a new format with a panel of industry leaders responding to a set of questions identified in advance with attending government representatives.

Panel:

- Rod Cameron, Joint Meetings Industry Council (JMIC)
 - Nina Freysen-Pretorius, International Congress and Convention Association (ICCA)
 - Don Welsh, Destinations International (DI)
 - Nan Marchand Beauvois, United States Travel Association (USTA)
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- Dieter Hardt-Stremayr, European Cities Marketing (ECM)
- Greg Clark

Questions:


1. **What are the current key challenges for the industry and how are policy makers engaging with the industry to address these?**
2. **What are the enduring legacies for destinations arising from holding business events?**
3. **How can/should the forces of localisation and globalisation be balanced in the future?**
4. **How can destinations build in greater resilience to counteract threats to security, climate change and over-tourism?**

Discussion points:

What is the biggest challenge for the meetings industry?

- Maintaining relevance in a time of unprecedented change
- Being recognised as an independent sector beyond tourism with a different set of values that are incremental to those associated with the visitor economy
- Achieving better alignment with other private, public, community interests and organisations to advance collective influence and achieve better coordination
- The absence of significant influence and soft power in interacting with other sectors and governments
- Developing a clearer story that is better aligned with economic development, knowledge, innovation and advancement
- For specific destinations, concerns about perceptions as well as realities

How can an event leave a positive legacy?

- A variety of specific examples were cited, illustrating the importance of legacies being relevant to local priorities
 - The need to better define and quantify legacies to allow more effective comparison with other sectors
 - That legacies may be tangibles (e.g. the World AIDS Conference in South Africa that left two world-class AIDS research centres) as well as legacies of knowledge
 - The importance of recognising business and investment legacies that arise through induced effects along with direct event outcomes
 - That there are likely very different sets of legacies and importance levels based on what stage of development a particular destination is in
 - Realistic time frames must be maintained as the full benefits may only develop over long periods of time
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How can concerns around globalisation be balanced with local concerns?

- Globalisation is a reality, driven largely by high-level macro dynamics and therefore not something that can be realistically influenced by individual countries or sectors
- However, local impacts must be identified and addressed through better management and education about the benefits
- Genuine engagement with local cultures is important, otherwise unique destination experiences are lost
- Local engagement in events is a positive way of generating awareness of the benefits arising from them
- Globalisation is inextricably linked with local impacts and opportunities so needs to be a part of the overall destination strategy
- Strategies for managing impacts must always be adapted to a specific set of circumstances, but lessons can be learned from others

How can the meetings industry achieve sustainability and support city resilience?

- Cities now under pressure to focus on the impacts of growing numbers of visitors on local residents and the quality of life in the community
- Cities must have effective crisis response mechanisms for the benefit of both locals and visitors, the latter often being relatively forgotten in a crisis
- Policies around better integrating industry needs with those of the community must be supported by ongoing institutions and mechanisms
- Business disruptors may be another important area impacting industry sustainability but is little studied at this point

Final words from the panel:

Panellists identified their biggest priorities for government policy change:

- Having governments take specific measures to convert general principles on the meetings industry into specific actions/policies
- Looking to the future wellbeing of residents when making decisions about the roles the industry could play
- Ensuring more local colour is incorporated into the destination product and its promotion
- Recognising the long-term importance of a welcoming attitude towards visitors regardless of other government policies



4. Concluding remarks:

Greg Clark made the following key observations and recommendations:

Industry influence:

- There is an absence of influence - the meetings industry needs to tell a better story as it is seen as too bound up with tourism
- The meetings industry is a broad enabler, more akin to areas such as financial services/academia than tourism
- The industry needs to better define what its story is – and *tell it clearly* – using case studies in language that governments and policy makers understand
- The economic impact/knowledge and investment legacies are not currently well defined – legacy is important but difficult to measure
- The meetings industry needs to show leadership by:
 - writing up the stories (case studies)
 - leveraging the benefits
 - leveraging the *brands* of high-profile events (e.g.. Davos) and showing their impacts

Globalisation/city resilience:

- New cycles such as technology/the experience economy create issues for nation states however, we are in a time of huge opportunity and global exchange is growing
- The meetings industry must be part of these new cycles, particularly on a local basis
- There should be more interaction with government, particularly in areas such as growth measurement and how to manage projected growth
- There is a need to address unintended consequences such as land use, economic inflation, crowding impacts during events, and disruptors such as Airbnb and low-cost airlines

Government policy:

- National government needs to re-categorise meetings in the correct sectors
- Sectoral policies need integrated responses from industry as governments cannot easily deal with unintended consequences
- There is a need to build local industry capacity and empower regional government as local leadership is needed to create growth and the necessary alliances. Meetings can act as catalysts for change leading to successful cities
- Global governance is weakening – the meetings industry needs a clear voice as UNWTO will not represent it effectively
- Waiting for better policy is a bad approach – the meetings industry must itself tell a better story and keep the appetite strong at a local level (e.g. through a more strategic use of meeting facilities)

The 2019 IMEX Policy Forum will take place on Tuesday 21 May.

**Save the date and register your interest now by emailing
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