

Philippine MICE Tourism Post-Covid 19: An Overview of Challenges and Opportunities

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The unprecedented impact of the novel corona-virus (COVID-19) adversely affected the Philippine Meetings, Incentives, Conventions and Exhibitions (MICE) industry. Optimistic forecasts and expected increases in arrivals and investments in infrastructure were stifled by travel restrictions, involuntary quarantine, and social distancing bringing the industry to a standstill. However, the pandemic offers a unique opportunity to rethink and innovate strategies to transform MICE tourism. Anchored on the value-chain and stakeholder theories, this paper argues that recommendations from stakeholders are critical as the industry pivots into the new normal. Using primary and secondary data, the study reveals that the barriers include limited MICE infrastructure, intermittent internet connectivity, and non-targeted marketing campaigns. On the other hand, the study shows that the Philippines can leverage on its human resources, authentic tourism products, and opportunities for strong collaboration. Although the respondents were limited to a panel of industry experts, the results of this exploratory research resonate with similar studies. Further empirical studies may reveal its feasibility for sustained growth and development in a post-COVID-19 MICE tourism landscape. Moreover, the pandemic may provide the impetus to further strengthen the collaboration and partnership between stakeholders across the MICE value chain.

Keywords: MICE Tourism, Philippines, post COVID-19, Stakeholders

1. Introduction

The Global Business Travel Association (GBTA) reported that the overall business travel spending totaled US\$1.4 trillion in 2019 (BTI Outlook, 2021). Statistics from the International Congress and Convention Association revealed that there were 13,254 meetings held in the same year (ICCA, 2019). In addition, the UFI-Global Association of the Exhibition Industry (UFI, 2019) reported that 32,000 exhibitions are held annually showcasing 4.5 million exhibitors seen by over 303 million visitors. The Philippines, on the other hand, generated Php550.2 billion in international tourism receipts from 8.3 million arrivals in 2019 (PWC Philippines, 2020).

In 1982, the Philippines was ranked eighth worldwide in the list of top convention destinations. In the same year, the country was listed as the top Asian destination for business events (Manila Bulletin, 2018). The Philippines was also a major signatory to the 1980 Manila Declaration on Tourism, 1997 Manila Declaration on Social Impact of Tourism and the Sixth International UNWTO Conference on Tourism Statistics. Aside

from natural and cultural attractions, the Philippines is acknowledged for its unique brand of hospitality and cosmopolitan environment. The country is also home to the Philippine International Convention Center (PICC) and the Philippine Airlines (PAL), first convention center and the first commercial airline in Asia, respectively. But it has not been leveraging these and other resources to enhance its competitive advantages. The country has consistently trailed behind Singapore, Thailand, and Indonesia in terms of the annual number of meetings hosted and delegate arrivals.

Table I RANK OF SELECTED
COUNTRIES
FOR THE YEARS 2015-2019

Year	Thailand	Singapore	Indonesia	Philippines
2015	# 6	#1	#12	#13
2016	#5	#6	#11	#14
2017	#6	#7	#11	#13
2018	#5	#8	#11	#12
2019	#6	#8	#10	#13

Table I summarizes the rank of selected countries based on the number of meetings hosted for the years 2015-2019; while Table II enumerates the number of meetings hosted for the same period. These data were based on statistics from the International Congress and Convention Association (ICCA).

Table II NUMBER OF MEETINGS HOSTED FOR THE YEARS 2015-2019

Year	Thailand	Singapore	Indonesia	Philippines
2015	151	156	78	57
2016	174	151	94	66
2017	163	160	89	56
2018	193	145	122	64
2019	162	149	95	72

Moreover, the impact of the novel coronavirus (COVID-19) reset gains generated from a steady increase in the number of MICE events hosted over the past five years. As early as the first quarter of 2020, the Philippine Department of Tourism (DOT) reported a 36% reduction in international tourist receipts amounting to losses of PHP279.5 billion. (PWC Philippines, 2020). Almost 80% of tourism-related businesses have chosen to temporarily halt operations expecting 50% of revenues lost during the Enhanced Community Quarantine (ECQ) that was implemented on March 16, 2020 (PWC Philippines, 2020). However, these figures are not indicative of the impact on the MICE sector since the Philippines neither has an updated database nor metrics on business tourism despite its inclusion as a key priority tourism product (PACEOS, 2020).

This paper argues that the Philippines needs to revisit strategies outlined in MICE Roadmap 2030. This business model that was jointly prepared by DOT in collaboration with the Board of Investments (BOI) and the Department of Trade and Industry (DTI) may need to incorporate stakeholder interest. Recommendations from stakeholders “can guide the creation of suitable strategies contributing to the recovery process and transformation of the sector (Rwigema, & Celestin (2020, p. 201).” The role of stakeholders in the success of MICE tourism

has been underscored in several studies that relate to the use of information and communications technologies (Buhalis, 2019); relationships with event managers (Kokkomäki et al., 2010; Jungyoung et al., 2017); and strategies for crisis recovery (Rwigema & Celestin, 2020; Rittichainuwata et al (2020); Sangpikul & Kim, 2009).

Bueno et al (2020) also emphasized that “intermediaries are key stakeholders in the design and production of the MICE product since they facilitate the path between buyers and suppliers (pp. 6-7).” Thus, the respite brought about by COVID-19 is a most opportune time to reposition the Philippines as a MICE destination with inputs from intermediaries who have been severely affected by the pandemic. Moreover, this paper is anchored on the value-chain approach and network analysis proposed by Soteriades & Dimou (2011) and tourism transformation through innovation theory by Brouder (2020). The former proposed the “optimum use of human and natural resources, taking into account the needs of all stakeholders, while encouraging the building of connections, identifying common concerns, capacity building, and coordination of effort, and has direct implications for the kinds of networks that could influence events tourism” (p. 335). On the other hand, the latter postulated that “tourism transformation can occur if there is sufficient institutional innovation resulting from both the demand and supply sides of tourism (p. 484).”

2. Method

For this exploratory research, a combination of primary and secondary data were collected. The study adopted a qualitative descriptive (QD) approach to understand the challenges and the opportunities in a post-pandemic MICE industry in the Philippines. This approach has been acknowledged as “appropriate for research questions focused on discovering the who, what, and where of events or experiences and on gaining insights from informants regarding a poorly understood phenomenon and when the time or resources are limited” (Neergaard, et al., 2009; Sullivan-Bolyai et al., 2005).

Preparations for this research began before the pandemic but interviews were

conducted during the initial stages of the lockdown in the Philippines. Face-to-face interviews were not an option given the travel restrictions, social distancing and other quarantine policies issued by the Office of the President (CNN Philippines, 2020). The experts were also geographically distant from each other preventing the possibility of conducting focus group meetings. Probing and in-depth live discussions would pose challenges given the intermittent internet signal. Thus, the study maximized the use of internet tools such as Facebook Messenger and Gmail to solicit the participation of eight industry experts who agreed to respond to the questionnaire via email.

The experts were selected using a purposive sampling method. Each one represented a key MICE sector, namely, accommodations, entertainment, marketing and creative services, travel agency, tour association, information and communications technology, national tourism organization, and the academe. The design of the questionnaire was adapted from tourism scales on convention city attributes developed by Baloglu & Love (2005). It had 10 questions focusing on seven themes, namely, infrastructure, human resources, industry collaboration, ease of doing business, branding, political climate, and tourism products and services. In order to support the primary data collected, an online search for relevant information was conducted using the keywords “Philippine tourism,” “MICE tourism,” “impact of COVID-19 on MICE,” and “MICE destination strategies.” An analysis of literature included textbooks, reports, and research articles. In addition, online conferences presented between March and April 2020 that were organized by the DOT, UNWTO, WTTC, ICCA, and UFI were likewise reviewed.

3. Results and Analysis

According to the 2030 Philippine MICE Roadmap, the forecasted Gross Value Added (GVA) of MICE would reach PHP1.4 billion by 2030. The average rate of increase in delegate expenditure would increase by 19% from 2016 generating PHP24.6 billion in revenues by 2030. This was based on a forecasted annual three percent increase in

arrivals for the period 2016 to 2030 (DOT, BOI, DTI, 2018). In terms of infrastructure, 10,000 square meters of usable exhibition space were expected to be completed in the same period. Overall, these were predicted to boost the rank of the Philippines from number 16 in 2016 to number 10 by 2030 among the countries listed in the Asia Pacific cluster (DOT, BOI, DTI, 2018).

However, the novel coronavirus (COVID-19) has reset the gains and forecasts of increased growth in sales, revenue, and scope. It is now imperative to conduct a rigorous review of financial assumptions, business models, and strategies. Furthermore, Seraphin (2020) emphasized the critical importance of updating MICE strategies as we review the significance of the role of stakeholders in the tourism value chain (Roxas et al., 2020) in preparation for a post-COVID environment.

Based on the results of the primary and secondary data, there are three major barriers that may hinder the progress of the Philippine MICE industry in a post-pandemic scenario, namely, infrastructure, business climate and branding. On the other hand, soft skills, authentic tourism products, and industry collaboration were identified as providing the best opportunities for growth and expansion. These findings resonate with the results of similar studies undertaken in Galicia and Santiago de Compostela (Morla and Ladkin, 2006); Hong Kong (Lau, Simon & Wong, 2010); Macao (Kit et al., (2015); Rwanda (Rwigema, & Celestin (2020); Sri Lanka (Chandana, 2013); and Thailand (Sangpikul & Kim, 2009; Jurakanit & Taweepornpatomkul, 2018).

The panel of industry experts overwhelmingly agreed that the current state of internet connectivity, public transportation and airport facilities are in disarray. In addition, there is a “dearth of globally-compliant MICE venues outside of the National Capital Region (NCR), limited availability of Halal and Kosher restaurants as well as the absence of local cultural centers.” It is generally argued that convention centers and facilities are the key selection factors for holding international events. According to Sylla et al. (2015), “infrastructure is the basic requirement in the planning process of MICE events. Transport accessibility, quality of hotel services and the

capacity of congress facilities are elements constituting a competitive advantage of one destination over another” (p. 118). Moreover, mobility and access are impeded by limited modes of transportation and the slow internet connection. Inevitably, the limited infrastructure may adversely affect the country’s reputation to bid for and host international events in a post COVID-19 scenario.

According to industry experts, coordinated efforts are also needed to present a strong MICE brand. A strong brand image can become the competitive advantage of a destination (Kotler et al., 1993; Hoque, 2016). This includes environmental cues and intangibles such as safety, security, convenience, and accessibility that are important to high-value clients. De Lara & Har (2008) emphasized that “prices may remain a key decision factor for the choice of MICE destinations, but the intangible elements of host cities/destinations, i.e. scenic beauty, social and cultural attractions, and diversity of tourism activities would receive equal or greater importance in the choice of MICE destinations...this is where Asia, would have the greatest advantage” (p. 180).

However, member-countries of the Association of Southeast Asian Nations (ASEAN) region have similar attributes: warm weather, natural wonders, and a rich cultural heritage. Therefore, the Philippines requires a distinct positioning that highlights its competitive advantages and unique characteristics. For example, the slogan, “It’s More Fun in the Philippines,” is better suited for the leisure market whose interests are tourist-related activities such as adventure, shopping, and cultural trips. In comparison, the Thailand Convention and Exhibition Bureau (TCEB) emphasizes “sustainability, modern, artistic, revolutionary, and transforming” in its marketing campaign for business events. On the other hand, the slogan of the Singapore Convention and Exhibition Bureau (SCEB), “passion made possible,” is anchored on its framework of customer centricity, ecosystem, and performance (SCEB, 2020). These examples articulate that the image presented may be seen as the sum total of the brand personality as well as the anticipated tourist experience (Temporal, 2000).

To strengthen its position, the industry panel argued for “MICE marketing initiatives that are directed towards specific markets such as the Middle East, North America, and Asia.” Tinnish & Mangal (2012) proposed a sustainable marketing model designed to “differentiate the brand, drive innovation and creativity, save costs and promote social responsibility” (pp. 235-236). For example, the Singapore Tourism Board (STB) and the TCEB highlight their internet connectivity, smart city attributes, quality management systems, and research. Both tourism agencies are proactively marketing their destinations for the years 2021-2025 (SCEB, 2020; TCEB, 2020). These are in contrast with the panel’s observation of the short-term, tactical activities implemented in the Philippines instead of strategic medium to long-term marketing campaigns. Unlike traditional techniques, event marketing focuses heavily on stakeholder needs and preferences for concept design, event execution, and metrics that are custom-designed for each one project (Hall, 1997). Moreover, restarting MICE tourism will require consistent messages emphasizing compliance with strict WTTC and UNWTO health and safety protocols. These action programs include the need to rebuild trust and confidence as well as the creation of new normal operating policies without sacrificing a safe experience (UNWTO 2020a, p. 2). MICE tourism, unlike leisure tourism, is designed for business travellers who demand services that are safe, secure, and inclusive. According to Amadeus (2021), “80% of business travellers are willing to pay more to ensure the highest quality standards for their trips (p. 8). Aside from the issues related to infrastructure and branding, there is limited participation of stakeholders in national and local MICE policy creation.

From the industry’s point of view, MICE tourism may not progress if there is no coherent strategy, and consistent safe travel protocols. These arguments are aligned with the UNWTO policies regarding safe, seamless, and hygienic travel as the key to attracting business delegates and foreign event planners in a post COVID landscape (UNWTO, 2020). Although the DOT has released guidelines for MICE events and venues, consistency in the implementation of these protocols will be key in securing bids

for business tourism. Meeting planners prefer destinations that offer economic opportunities and favorable business climate (De Lara & Har, 2008, p. 173). From a macroeconomic perspective, it is critical to review the national tourism ecosystem specifically, the current business models, use of government funds, and operational structure (Sigala, 2021).

The respondents recommended that information and communications technologies (ICTs) capabilities must match global standards. The popularity of webinars, live conference and virtual exhibition may soon become part of the norm. These would require a new skillset on the use of chatbots, augmented reality, and computer-enhanced production design and staging, among others. In addition, the establishment of a “one-stop-shop MICE office” and a special “MICE lane at the airports” are essential services for stakeholders that must be made available even during the ECQ to begin benchmarking best practices applicable for a post-pandemic scenario. According to the Center for Exhibition Industry Research (CEIR), “77% of executives based in the United States believe that virtual events will become a bigger component of their physical events” (Ex-Link Events, 2021). Furthermore, updated statistics on business tourism sectors can be used for tourism planning and development. It may be challenging, if not impossible, to compete with other MICE destinations whose strategies are based on research (Sangpikul & Kim, 2009). Among the key research areas are big data analytics, smart tourism, co-creation, delegate journey, MICE metrics and evaluation tools, use of information and communications technologies (ICTs), quality management standards, event sustainability, and participant behavior. In addition, access to real-time data is necessary to empower stakeholders (McKinsey & Company, 2020, p. 6).

Despite these challenges, the industry experts identified three main strengths of the Philippine MICE sector, namely, human resources, wide availability of tourism products, and the potential for industry collaboration. According to the industry’s perspective, MICE organizers have well-honed customer service skills with an innate understanding of hospitality. They are also

acknowledged as “industrious, flexible, creative and demonstrate competency in English.” These strengths form the Philippine event experience that “integrates dimensions, such as physical environment, social actors, and participants and organizational dynamics and features of service delivery, which, in turn, influence the way the tourist lives the experience” (Campos et al., 2015, p. 21). However, the respondents “caution against complacency, lack of global competency standards, self-interest, and the tendency to initiate short-term tactical campaigns which may impede collective progress.” Arena (2020) reported that event organizers in Asia Pacific are “embracing new technologies, new communication strategies and new revenue structures to ride the coronavirus wave and, ultimately, emerge stronger” (p. 16). When seen from a positive point of view, the pandemic provides an opportunity for both professional and new managers to level up their skills with professional certifications for consistent service delivery (De Lara & Har, 2008; Kraaijenbrink, 2020). Furthermore, these skills may be deployed for the Philippines to position itself as a training hub for global standards in event management.

With reference to the range of products, the National Tourism Development Plan (NTDP) 2016-2020 prioritizes eight other products aside from MICE tourism, namely, education tourism nature-based tourism, cultural tourism, sun and beach tourism, leisure and entertainment tourism, health, wellness, and retirement tourism, cruise and nautical tourism, and diving and marine sports tourism (DOT, 2011). Unlike destinations with limited attractions, the Philippines has an enviable list. However, it is important that a product matches its intended segment to ensure success (De Lara & Har, 2008, p. 173). These can be achieved through the identification of niche markets and the use of a focused differentiation strategy that appeals to the unique preferences of a specific target segment (Thompson et al. 2010, p 157).

These arguments match the insights from the panel. They recommended that the portfolio may be improve with creating MICE products and services that are “culture-specific, thematic, and activity-based.” The respondents recommended “high-yield,

sustainable, and authentic offers such as destination weddings, slow food and gastronomic tours, island cruises, soft adventure as well as tours to indigenous communities.” Thus, re-positioning the Philippines as a MICE destination may empower delegates to co-create their experiences by actively participating in the design, creation, and evaluation of their journey as they immerse themselves in authentic travel experiences. Furthermore, their engagement may help contribute to the achievement of the United Nations Sustainable Development Goals (SDGs).

A major opportunity is to tap tourist source markets into a bleisure sector where business is combined with leisure activities. Expedia Research (2018) shows that 52% percent of international business trips turn into bleisure trips. These trips average 6.8 days where 57% percent is devoted to business and 43% is used for leisure. Moreover, the preferred bleisure activities by are easily accessible in the Philippines. For example, food and restaurants (56%), beaches (52%), natural attractions (51%), historical monuments and sightseeing (49%), museums, art and culture (41%), and outdoor recreation (39%). Foreign tourists interested in bleisure are among the major markets of the Philippines, namely, the United States and China (DOT, 2018). Furthermore, estimates show that MICE visitors in the Philippines spend six times more than leisure travellers (Francisco et al, 2017).

The success of any strategy requires stakeholder confidence, trust, and the willingness to adapt. Dwyer & Mistilis (1999) revealed that the most difficult challenge in MICE tourism is industry cooperation (p. 87). Likewise, the respondents observed that MSMEs, who form the majority of the sector, do not have a unified voice to lobby for support neither are they organized to seamlessly coordinate service delivery.

Aside from the concept of teamwork, the industry can tap into the Filipinos’ sense of *bayanihan*. It is often referred to as the spirit of solidarity and compassion “without expecting a reward...although the favor is expected to be paid forward in one’s lifetime to another person in need” (Ealdama, 2012, n. p.). It is interesting to note that the Philippine

government is also “depending on *bayanihan* from the local government units (LGUS) and the Inter-Agency Task Force (IATF) in its fight against COVID-19” (The Philippine Star, 2021). This act of extending assistance matches the UNWTO recommendation to strengthen community participation in tourism towards the new normal. The UNWTO has shifted its focus from the urban landscape to inclusive community development. Instead of a public-private partnership, the organization refocused initiatives through a public-private-community partnerships (PPCP) approach (p. 16). Moreover, the framework empowers communities by

... fostering innovation, digitalization and entrepreneurship including the digitalization of the whole tourism ecosystem and social entrepreneurship through support to local micro, small, and medium enterprises (MSMEs) that is critical to empowering and developing communities, providing them competitive advantages and access to the markets at both national and regional levels (UNWTO, 2020b, pp. 8, 14).

Stakeholders may use social media and mobile applications for collaborative commerce as well as to coordinate in the implementation of health and safety protocols. According to the UNWTO (2020b), “digitalization is expected to continue propelling the travel experience on its trajectory towards becoming more seamless, frictionless, and high quality and in a way that contributes to the achievement of the SDGs of the United Nations.” Although the internet download speed in the Philippines is 16.7 mbps as compared with 60.5 mbps, 34.4 mbps, and 33.2 mbps for Singapore, Thailand, and Vietnam, respectively (Hootsuite & We Are Social, October, 2020), it logs in 9.45 hours per day with an average of 4 hours and 15 minutes per day on social media (Hootsuite & We Are Social, January 2021) which can be redirected towards, communication, collaboration and coordination. Thus, the focus on the community as a key player may be achieved through interconnectivity using

best available technologies and devices to help ensure their active participation in tourism programs.

Warschauser (2004) posited that “what is most important about ICT is not so much the availability of a computing device or the internet ...but rather the people’s ability to make use of that device and line to engage in meaningful social practices” (p. 9). Furthermore, the Philippine government may “take advantage of the respite to reimagine, transform, review existing operating structures, and reduce the digital gap among MSMEs for a better normal” (McKinsey & Company, August 2020).

4. Conclusion

This paper seeks to emphasize the need to incorporate stakeholder recommendations in restarting tourism. Without a clear end in sight, the response to COVID-19 requires more than a paradigm shift. As an exploratory research, this study has some limitations. First, it used a purposive sampling method that may not represent the majority. Second, it was written during the first phase of the lockdown in the Philippines when stakeholders have yet to fully understand the extent of the crisis.

Although this study is generally conceptual and requires empirical data, it presents a starting point for discussion of the potential challenges and opportunities based on opinions of industry experts that reflect results from similar researches. Authors also agree that a revisit of pre-pandemic strategies is necessary to pivot into the new normal. Future research agenda may focus on collaborative solutions, leveraging on opportunities, developing a knowledge database, redesign of strategies, and the use of technologies to empower stakeholders as they build stronger partnerships for consistent service delivery.

Furthermore, researches focusing on the trade exhibitions and incentive travel markets, hybrid and virtual platforms may be conducted with a larger number of respondents. Thus, this study seeks to underscore the urgent need to include stakeholder opinions in the Philippines’ bid to become a preferred MICE destination in a post-COVID-19 environment.

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