

MICE Tourism Policy and Strategy Responses in Managing the Impact of COVID-19 Pandemic

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Abstract

The current study explores the policy and strategy responses deployed by South African MICE (meetings, incentives, conferences, and exhibition) tourism governing bodies and industry associations in managing the impact of COVID-19 on the industry. Following a qualitative approach, interviews were held with representatives of the MICE sector, including industry, association, and government representatives. The results show that while financial assistance had been the initial policy response, the inconsistencies with the temporary relief funds (TERS) had been a challenge for members of the MICE industry. Also, the MICE tourism bodies had to realign their key policies to the industry's transition to virtual and hybrid events. Further, transformation within MICE tourism has been a central focus in rebuilding tourism post-COVID-19. The current study illustrates both the short-term and long-term tourism policy and strategy responses, which had moved from mitigation to resilience building.

Keywords: MICE tourism, policy responses, COVID-19, South Africa

Introduction

Declared a pandemic in March 2020, COVID-19 is recognised as one of the world's largest (and most challenging) health and economic crises (Ho & Sia, 2020). In a relatively short time, COVID-19 has reshaped the growth trajectory and development pathways for global destinations (Rogerson & Rogerson, 2021a; Kuscer, Eichelberger & Peters, 2021; Muragu, Nyadera & Mbugua, 2021). This is because of how the virus spreads, which has resulted in the implementation of suppressive and restrictive measures by governments worldwide (Mbatha, Harilal & Tichaawa, 2017). Amongst the common policy measures taken included the suspension of travel, closure of international borders, and restriction of the number of people within public venues (Muragu et al., 2021; Lekgau & Tichaawa, 2021). Resultantly, the tourism industry has been reported to be one of the most devastating industries by the pandemic (Abbas, Mubeen, Iorember, Raza & Mamirkulova, 2021). The United Nations World Tourism Organisation (UNWTO) (2021) reported that in 2020, international tourism dropped by 73% and that the subsequent collapse of international travel resulted in substantial losses in export revenue (amounting to US\$ 1.1 trillion).

In respect to developing countries, specifically in Sub-Saharan Africa, the United Nations Conference on Trade and Development (UNCTAD) (2021) contends that the pandemic has devastated many economies in the region, mainly owing to the strong dependence of these economies on tourism. The World Bank (2020) predicted that the region could lose approximately two million jobs (both direct and indirect) and US\$50 billion from the shutdown (and continued restriction) of the tourism industry. Muragu et al. (2021) draw attention to the airline industry, revealing a revenue loss of approximately US\$4.4 billion due to the closure and suspension of air travel. While this had resulted in some emerging research on COVID-19 and tourism destinations in Africa (see, for instance, Dube, 2021; Hambira, Stone & Pagiwa, 2021; Bama & Nyikana, 2021; Makoni & Tichaawa, 2021), much of the available studies have focused on understanding the nature of pandemic's impact, and the implications on ongoing tourism survival. Other studies have adopted crisis management, and to a lesser extent, resilience theory in understanding the response actions taken (Hemmonsby, Tichaawa & Knott, 2020; Soliku, Kyiire, Mahama, & Kubio, 2021; Okafor, Khalid & Burzynska, 2021). This current study is premised based on calls by Shao, Hu, Luo, Huo, and Zhao (2021), who argue that tourism research has paid less attention to tourism recovery, specifically to policy and strategy documents developed in response to the pandemic. South Africa, like several other countries, declared the country to be in a state of emergency under the Disaster Management Act, which led to the implementation of the lockdown regulations (Kotze, 2020). Tourism recovery is both dependent on the survival and adaptability of the industry to the conditions presented by the COVID-19 regulations, as well as the collaborative efforts taken in paving the way for industry recovery. The Department of Tourism (2020) argues that the reopening of tourism and industry recovery be dependent on strategic planning and coordination of policy execution.

The current study focuses on the responsive policy measures introduced to minimise the impact of COVID-19 on MICE tourism. The COVID-19 regulations have drastically changed the operating conditions of the MICE sector, most evident by the prevalence of virtual and hybrid events becoming the most widely used means to host such events (Bartis, Hufkie & Moraladi, 2020). This, coupled with the severe economic impact taken by the sector, has led to major rethinking around recovery and resilience. As such, the focus on policy and strategy reformulation is based on the need to understand how leading MICE tourism bodies are planning a way forward and to what extent resilience is being embedded within this process. Further, it is also important to consider the role of MICE tourism in South Africa, as it forms an important tourism segment and has been targeted as a key growth area evident by the significant public investment in infrastructure and MICE facilities (Rogerson, 2019; Marais, de Plessis & Saayman, 2017). Additionally, the sector plays a major role in the economic recovery as it has grown to form a key component of the global economy. Therefore, it becomes paramount to unpack the policy responses to gain better insight into sector recovery as well as how the sector could contribute towards tourism recovery. Finally, despite the importance of the MICE sector towards revitalising the economy and contributing to tourism recovery, it remains a largely neglected research focus in tourism and concerning COVID-19, specifically within the context of Sub-Saharan Africa where this form of tourism holds a substantial share of international visitor arrivals (Tichaawa, 2017; 2021).

MICE tourism and COVID-19

MICE tourism, which lies at the centre of the international tourism economy, focuses on business-to-business interactions (Rogerson, 2015a; Davidson, 2019). This form of tourism consists of the organised gathering of professionals to purposively interact with one another for a particular focus (Sylla, Chruscinski, Druzynska, Plociennik & Osak, 2015). MICE tourism

experienced strong growth before the pandemic, in which Rogerson (2015a) noted the segment consisted of a quarter of tourism activity in many destinations. The growth of the sector has been premised to be driven by (economic) globalisation and the internationalisation of business and to be an articulation of the global economy (Rogerson, 2015b). In this regard, this form of tourism has been widely considered a vital means of fostering knowledge creation, sharing, and trade within global economies (Davidson, 2019; Marques & Pinho, 2020). Similarly, some scholars have written on the economic and non-tourism benefits of this sector, contending on their ability to aid in business (and professional) development, foster spaces for innovation in respective fields, and provide opportunities for trade expansion and foreign direct investment (Jago & Deery, 2010; Davison, 2019). While such (non-tourism) benefits of the sector had been largely neglected in research, the few available studies on MICE tourism had strongly opined the significance of the sector for destination development (Alanazeh, A-Badarneh, Al-Mkhadmeh & Jawabreh, 2019; Iacuone & Zarrilli, 2018; Trisic & Arsenov-Bojovic, 2018; Bueno, Urbistondo & Martinez, 2020). For instance, the MICE tourist market had been widely agreed to be highly lucrative (Iacuone & Zarrilli, 2018; Trisic & Arsenov-Bojovic, 2018; Rogerson, 2015a, 2015b; Tichaawa, 2017). This is primarily owed to the higher (compared to leisure tourists) spending of MICE tourists, and these visits often result in extended stays (or future travel intentions) for leisure tourism (Rogerson, 2019). Consequently, this form of tourism had been conceptualised to be a growth area for Sub-Saharan Africa before the pandemic (World Bank, 2012; Tichaawa, 2017, 2021).

Understandably, the banning of travel and events put the MICE sector under significant threat (Seraphin, 2020). The few available studies on the impact of COVID-19 on MICE events have cited the loss of employment, the disturbance of the global supply chains as well as the disturbance of the MICE multiplier effect as some of the major consequences of the shutdown of this tourism activity (Palrao, Rodriguez & Estavao, 2021; Seraphin, 2021; Steriopoulos & Wrathall, 2021). For instance, Palrao et al. (2021) describe the accommodation sector as one of the suppliers to MICE tourism as having lost considerable revenue from this market. Indeed, the development of MICE tourism had been evident in the emergence of hotels and other types of accommodations specifically geared to business travellers. Some studies have explained that while the COVID-19 pandemic has threatened the livelihoods of millions of MICE professionals, it had also provided an opportunity for the sector to reinvent itself (Seraphin, 2020; Steriopoulos & Wrathall, 2021; Palrao et al., 2021; Dillet & Ponting, 2021; Ho & Sia, 2020). Prominently, this had been more evident in the transition to virtual events, and later (as regulations ease) hybrid events. Virtual and hybrid MICE events have been found to maintain operations within the sector (Lekgau & Tichaawa, 2021), particularly in difficult travel circumstances. Further, the pandemic had undoubtedly changed the demand travel patterns, behaviours, and preferences (Rogerson & Rogerson, 2021b), thereby necessitating the supply side to similarly adapt to such changes. The current study, therefore, examines the nature of the adaptation to COVID-19, from the angle of the responsive policies and strategies developed in this regard.

The case of South Africa

Realising the potential of MICE tourism for destination development had resulted in significant infrastructural improvements (in meeting international standards and therefore competing on a global scale) (Marais et al., 2017). For instance, the importance of the MICE sector has been evident in the growth of accommodation establishments targeting MICE tourists and the business hotel networks (Rogerson, 2019; 2015b). From the national scale, the government of South Africa had undergone an urban regeneration strategy through the construction and improvement of MICE facilities. Furthermore, the country established the South African

National Convention Bureau (SANCB) and the subsequent provincial (and city) convention bureaus (Donaldson, 2013). Donaldson (2013) further expanded that the creation of the national convention bureau had been to support and coordinate the countries bidding activities, market South Africa as an attractive MICE destination, and provide policy and consultancy support for the development of MICE tourism in the country. The vitality of MICE tourism has also been accrued to the formalised structure of the sector, in which Bartis et al. (2020) explains the sector comprises of three segments, the supply side, the decision-makers, and the support service providers. Professional and industry associations play an important role in representing the interest of their members and ensuring their continued growth (International Labour Organisation [ILO], 2020). The MICE sector of South Africa had been represented by five of such associations, including the Southern African Association for the Conference Industry (SAACI), the Society for the Incentive Travel Excellence (SITE), the Association of African Exhibition Organisers (AAXO), the Exhibitions and Events Association of Southern Africa (EXSA) and the Professional Conference Organisers (PCO) Alliance (Bartis et al., 2020).

The role of these associations has heightened instrumentally since the start of the pandemic. This has been primarily evident through the establishment of the South African Events Council for the coordinated lobbying of the government against the current regulations that limit the operations of the MICE sector (Tourism Business Council of South Africa [TBCSA], 2020). Moreover, the early months after the declaration of the national lockdown in the country saw policymakers working closely with the associations in kick-starting crisis management strategies. This led to several government-industry collaborations in developing recovery strategies (SA Travel Trade, 2021). However, owing to the nature of MICE tourism in the country (as being dependent on international delegates and taking on an event form), the South African Tourism Recovery Plan acknowledges the uncertainty around the recovery (and the planning thereof) of MICE tourism (SAT, 2020). Indeed, the lockdown regulations, primarily the international bans and the restrictions on the number of people gathering at venues, have placed stringent regulations on the MICE sector. Coupled with this is the cyclical nature of the rise of infections, which has been followed by restrictive measures on the MICE tourism sector and has caused much uncertainty over fully reopening of the MICE sector. Thus, this has necessitated much policy intervention from national tourism governing, and leading bodies and strategy formulation from industry associations to pave a path towards sector-specific recovery and building resilience.

Methodology

Owing to the exploratory nature of the study, and the study context, a qualitative research design had been adopted. The qualitative research approach has enabled the inductive investigation into the study phenomenon. In this regard, the research process has consisted of two phases of data collection. The first phase included a documentary analysis, where the policies, strategies, relevant documents, and reports from government, MICE tourism industry organisations (and associations) had been collected. These documents, which had been developed since the start of the pandemic, had delineated the recovery pathways, the strategies on adapting the virtual and hybrid platform of hosting events had essentially provided some understanding of how the MICE sector had been operating during the pandemic. The information obtained from the documentary analysis had informed the second phase, which involved the collection of primary data. In this phase, several interviews were conducted with various stakeholders of the MICE sector. The researchers had purposively selected representative organisations from the three segments of South Africa's MICE sector, including the supply side (i.e., event planners, venue and audio-visual (AV) suppliers), the decision-makers (i.e., the National Department of Tourism and SAT) and the support service providers

(i.e., the South African National Convention Bureau [SANCB] and industry associations). Representatives from these MICE segments were included in the study owing to their role played in MICE tourism, as they represented the interests of their members (or MICE industry as a collective), in lobbying for the government to reopen the sector, and providing direction and assistance to industry members in pivoting to the virtual environment.

In total, twenty-nine interviews were held virtually from March to June 2021. The interview schedule was developed from the data generated from the documentary analysis and the literature on tourism recovery and resilience. The interview questions had centred on unpacking the planning (and development) of MICE recovery strategies, the support offered by key governing authorities and industry associations and exploring the key considerations within the policy formulation processes. The interviews had been recorded verbatim (with permission obtained from the respondents), transcribed, and loaded onto Atlast.ti version 9. The qualitative analysis software enabled the coding of the data and the generation of group codes that represent the major themes derived from the data collected.

Results and discussion

Economic responses

The current study finds one of the earliest policy measures to aid tourism businesses had been the provision of financial assistance. Many respondents had acknowledged the efforts of the National Department of Tourism in providing the tourism relief fund, which had meant to mitigate the impact of the lockdown and minimise the job losses. For instance, a representative from the Department of Tourism underlined:

So as a way of responding to that government came up with fiscal response measures. And to build upon that, our sector was one of the first to come up with a fiscal response in the form of a tourism relief fund it was 200 million. And SMMEs, the small, medium, and micro enterprises were the ones who were targeted for this relief fund. And they were using the BEE qualifying criteria. So, if you are transformed, you'll be able to get these funds. The allocation had spread across the provinces equitably, to ensure geographic spread and ensure that businesses are supported across the country and the funds were reserved solely for firms that were mainly in the tourism sector. And the application for the funds started around April until May, and then be it was paid in July 2020.

Fiscal measures have been a common policy response for most governments globally (UNWTO, 2020; Nwayo, 2020; Palrao et al., 2021). In this current case study, tourism accounts for a major share of the employment numbers in the country, therefore the aim to preserve jobs had meant additional funds being made available for the industry, such as the R30 million made available for tour guides in the country (Nwayo, 2020). Interestingly, the respondents had concurred that the temporary employee relief scheme (TERS) had been one of the most helpful schemes, owing to that it enabled MICE tourism businesses to be able to support some of their employees. One MICE supplier enunciated:

There was then another government-wide scheme, the one that they call the TERS. And this was the most impactful one. And because it was given to... it was helping businesses to be able to pay employees and avoid people being retrenched. So those businesses which are contributing to UIF, the money was paid to the employees, so that they can be given their salaries.

The respondents had concurred that these measures had been to aid businesses stay afloat during the country's lockdown that had severely restricted MICE tourism activities. This had meant that these businesses had been (and continue to) losing much of their revenues, which had resulted in the massive job losses faced in the MICE sector. Accordingly, the study finds that the TERS payments had been instrumental in assisting MICE tourism businesses in paying the salaries of their remaining employees.

However, many of the respondents had averred that there had been several challenges associated with such funds, one being the difficulty in accessing this financial relief. One trade show organiser mentioned, 'There are some cases where people have been able to get relief funds or been able to get TERS or but not, not everybody'. Furthermore, another major challenge has been that TERS for the MICE sector has stopped, which has severely hampered the financial state of these businesses. For example:

Every time they did TERS... The first [time] they did TERS for three months, and they stopped, then they did it again. And a lot of companies, I mean, we relied on that. Because you're not paying your staff their full salaries so at least that something extra they can go towards the staff. And there seems to be some lack of understanding, I think maybe on a government level, in terms of how relied upon we were on that money because they took that away. So, it stopped in October last year. And December was the last month for payments. And so that means that organisations have had to engage with them again, to try and get them to bring it back.

Nwayo (2020) broadened that this had been due to the broad scope of the tourism industry and the financial limit on providing financial relief for the entire tourism industry. Similarly, a government representative acknowledged that the funds had not been enough, stating:

But they were about 7200 applicants and around 4000 were successful. And, of course, the fund could not be allocated to cover everyone due to fiscal constraints that come in this space. And to the point to the businesses that were successful, [they] were given R50,000 once off to try and just keep them afloat. And this was really nowhere near enough as the government has acknowledged.

Evident in the above, members of the MICE sector had been disadvantaged, as while there had been some financial aid, in the beginning, the cancellation of in-person events caused by the lockdown regulations, (particularly the prolonged nature of the pandemic and fluctuating increases in positive cases which had been subsequently followed by stringent regulations), and the increased risk perceptions around travelling (Samdin, Abdullah, Khaw & Subramaniam, 2021; Sanchez-Canizares, Cabeza-Ramirez, Munoz-Fernandez & Fuentes-Garcia, 2021; Rogerson & Rogerson, 2021a) resulted in cashflow challenges for organisations in the sector. The provision of financial relief was provided primarily by government departments, with the efforts of industry associations who were geared towards assisting members to gain access to these funds and trying to mediate with banks who viewed the sector as a risk for a loan.

Development of MICE protocols

The second major policy and strategy response from the sector had been the development of protocols to regulate the hosting of in-person events under COVID-19 regulations. MICE events have been classified under 'mass gatherings' under the South African Disaster Management Act, as well as the United Nation's World Health Organisation (WHO). The

nature of COVID-19 transmission subsequently resulted in the cancellation of events, including those in the MICE sector (Hemmonsbey et al., 2021), even before the country had declared a state of emergency and instituted the national lockdown. This led to the transition to using virtual events to ensure the continuity of the sector during the first few months of the pandemic. Simultaneously, there had been much discussion around the hosting of MICE events in compliance with the COVID-19 regulations. Many of the respondents agreed that while the MICE sector had a strong focus on health and safety before the pandemic, there was now a greater emphasis on health risk management. While the TBCSA and the SAT, and other tourism stakeholders, already established the recovery plan and reopening protocols in May 2020, which was set up to guide tourism business in the country and reopen the industry in a COVID-19 safe manner and set out the course for recovery, the nuance of the MICE sector required its own set of guiding protocols and plan.

Accordingly, the documentary analysis reveals this to have led to the development of protocols and guidelines on how to host live events in a COVID-19 compliant manner. The development of the MICE protocols took collaborative efforts by various event governing bodies in the country, including the SA Event Council and the South African Communications Industries Association's (SACIA) Event Safety Council, and was informed by several national and international policies and guiding principles, including the South Africa Department of Health's recommendations, the country's Disaster Management Act and the Department of Employment and Labour, and the recommendations of the WHO and the National Institute for Communicable Diseases (NICD). Many of the respondents have noted that the protocols were developed to ensure the safe reopening of the sector:

Well, we've been driving to open the industry safely. We've put together 42-page reopening safety guidelines in March last year. And we are still working with that as a guideline, but it hasn't been really approved.

Our sector even went to the point of developing the protocols, the health protocols. So that we can open up [as well] when countries started to [also] open.

The event reopening guidelines largely re-examine the systems that were in place (particularly concerning risk management) and make provision for detecting, preventing, tracing, and managing COVID-19 in the event space (Event Safety Council, 2020). Amongst the common measures included was the provision of social distancing, temperature screening, sanitising and regular disinfection procedures, health symptom check, arrival protocols, and the subsequent supervision of these procedures (having a COVID-19 compliance officer) (Event Safety Council, 2020). Furthermore, the establishment of the protocols was to communicate to the global business sector the readiness of the country to host such events.

However, it is important to note that while the guidelines developed were instrumental in guiding the conduit of live MICE events, the respondents noted that the guidelines were prescriptive, and the implementation of protocols differed according to venue or event.

The tricky thing with the protocols, and it's just me having gone to venues in Cape Town now [is] that we can have face to face meetings again and I've also been to Joburg last year, is that [the] protocols [are] just a guideline. I've been to different venues where the processes were also different. So, I think everybody does the basic things. They all take your temperature, and you have to fill in the form, and you have to sanitise. So, I think the basics, everybody's got [that] right. But then different venues are also different.

Evidently, the protocols provide the core COVID-19 principles that must be complied with when hosting events. This leaves room for differentiation between different MICE venues, with large-scale venues adopting more detailed and stringent procedures in their COVID-19 protocols. For instance, one respondent representing one of the major international convention centres in the country mentioned:

You have to advise them that they need to... advise them to come earlier because there's the COVID screening that needs to happen before you can get into the venue. And once you're in the building, you need to make sure that you sanitised etc, etc., and all and then make sure that the venue is sealed and when the client arrives, they know that that venue is now ready for you. No one else has been in that venue. So, it's been cleaned and sanitised and ready and then at each break, they have like a tea and coffee break or a refreshment break, you know, when they go out there has to be an area that is socially distanced. So, you cannot have groups of people in little gatherings, you know, you have to have a COVID compliance officer, making sure that when they come out they need to wear the masks, they need to avoid more than three people around the table, be 1.5 metres apart.

These documents have been instrumental in providing much needed direction for the MICE sector to continue hosting live events. More so, the establishment of the protocols was to increase further the level of confidence in partaking in MICE tourism. Illustrating the consideration for delegates' safety and the ability of the sector to host such events while accounting for COVID-19 considerations will be paramount in alleviating the immense fear developed about travelling and gatherings. Moreover, the development of these protocols has been increasingly important for a country such as South Africa, a long-haul tourism destination, that discovered two COVID-19 variants, which unfortunately garnered negative reactions from the global community. Taking such matters into account, the study finds there to have been some strategy re-adjustments and policy formulation in planning for the recovery of the MICE sector, considering the emerging issues brought forth by COVID-19.

MICE policy and strategy re-adjustments

To a certain extent, the growth of the MICE sector before COVID-19 was the work done by the national convention bureau in marketing South Africa as a destination and providing bidding support to attract international events to the country. The current move to the virtual event space has disrupted many of the activities of the sector, including the bidding processes. The respondents brought forth the need for changes to the bidding policy and support of the national convention bureau, with one PCO stating:

I don't know if they will support it. So that subvention funding is so important to the client, [and] to the budget because it helps with marketing, it helps with bid support, it helps with onsite event services and things like that. So now, I'm speaking hypothetically, let's say a client who's going to get, let's say, 250,000 Rand in total support. Now, if they go hybrid, they will get between R50 000 and R100,000. But a hybrid conference costs double the price. So, if you think about it, you're paying for a normal conference, your day conference package, your teas and coffees, everything else, your venue rental, and your AV team on site. But then you're also going to have the virtual element, the hybrid. So, we're also paying for the IT, the platform to be used, the additional staff training, so we're looking at paying two separate quotes, it's the same but it's doubling up. If you go fully virtual, they're not supported at all, because

their mandate is obviously to bring people into South Africa. So, I can understand that. But now we go fully virtual so that we're not paying two costs, but then the client loses money.

Similarly, a trade show organiser mentioned that there might be a change in how virtual events are supported from a national level, stating:

So, I think they will continue to support because they need to get bums in beds effectively in the hotels, we need to get people into the country, we need to make sure that people are still visiting. But I'm not sure to what extent. I think the way any government organisation supports I mean, in NRF, the South Africa African National Convention Bureau, I think any department, the way they support conferences will probably change because their budgets have also been affected. I think there will be a massive change just in general in how things are supported. We've not heard anything yet. We just waiting to hear. What we do know is if you're going to go hybrid, you'll get between fifty thousand and one hundred thousand. And if you go virtual, you lose all your support.

In the latter months of 2021, the study found that the national convention bureau had indeed reformed their policies for bidding support, incorporating virtual and hybrid events as part of the events they support and thereby updating their methodology for such events. See, for instance, a statement by a representative of the organisation:

What we've been doing [is that] we've made amendments to the bid support programme. We changed the criteria a little but there is no minimum criteria. We've included a virtual delegate methodology and multiplier in our evaluation and scoring. So, if you have a virtual delegate component to your event, we actually give you financial support, it's very minimum. But if you [are] now talking about thousands of people that's where you... because we use it as a platform to market the destination. And we've included the tolerance level of about 30% to make sure that even if the delegate numbers fall, we have the tolerance and to be able to assist our clients.

Accordingly, while the convention bureau previously supported the bidding for events to come to South Africa, for attaining both the tourism and non-tourism benefits related to this market segment, the findings illustrate that since virtual events mean no physical travel to the destination, it can be used to promote the destination, thereby simulating potential travel intentions to the destination (and the destination as the future host for future events). The findings further suggest that the respondents believed that the promotion of the destination had been one strategy employed, as the virtual events had grown to be a preferred mode of MICE tourism, owing to the current regulations and the state of the pandemic in various nations. Further, many businesses have taken a massive hit during the past two years, which deemed in-person MICE events an expensive (and risky) endeavour. Accordingly, the discussions with the respondents revealed that it became paramount to be conscious of the current constraints in reopening MICE tourism in South Africa and the timing of destination marketing activities. Interestingly, some respondents had mentioned some other examples of popular MICE destinations that have managed to reopen their industry and had cited one of the primary reasons for that success to be linked to consistent public communications and messaging amongst the various MICE stakeholders. For instance:

We went to the likes of WTM, we went to the likes of your IBTM these are international shows. They said, the reason they were even able to stage shows, it's because they had the backing of Dubai and the country. They had all their ducks in a row. Their messaging since the pandemic started, has been out there to say, 'We are open, all you need to do meet our requirements', which is around vaccination, come with a COVID test that is negative, go in quarantine if need be. So, it's the messaging that has always been there. I think what most of the countries missed, was to remain top of mind about communication. And communicating where are we as far as the virus.

The quote above reveals that the strategy utilised by Dubai (as a MICE destination) emphasised the importance of collaboration, not only in recovery strategies and COVID-19 related policies, but the significance of all stakeholders in the sector presenting the same consistent messages to the global MICE market. Similarly, the study found that organisations who market South Africa in international exhibition shows had to also change their strategy owing to the current nature of the market MICE internationally, as well as the country's restrictions on MICE tourism. The representing respondents recognised that they need to change such strategies and be informed by research.

So, the insight that we get, the new insight that we gather has to translate into the strategy. It has to translate to the execution of Meetings Africa. So, we're going to continue having Meetings Africa moving forward, but maybe not the Meetings Africa as you know it. We will continue having ATI Africa Travel Indaba, and not the ATI as you know it. We have to remain relevant to the global trends, we have to remain relevant to the needs of an exhibitor.

The above takes cognisance that the MICE market is continuously changing, and the pandemic has resulted in the changing expectations of the demand side, in terms of both how such events are hosted (i.e., virtual, hybrid) and that this market may expect their needs (or objectives) for the event may have changed which thereby created the need to streamline the event to suit those needs going forward. This further augments the contention of change in the industry.

Emerging considerations for policy formulation

Evident in the discussions above, the COVID-19 pandemic had necessitated a re-evaluation of the country's existing policies and national strategies around tourism development. Furthermore, the study findings show the growing realisation amongst the government that the industry (and other economic sectors) cannot be operating as it presently is, under the Disaster Management Act. This had led to the definition of the norms and standards for tourism.

And we [are] waiting for Cabinet's final approval on the norms and standards to get a sense of what has been included for our sector, which we hope includes the bulk of what we've proposed, which will then become the norm is established. Because it's been a process underway, the government recognise that we cannot continue in terms of the Disaster Management Act. So should there be a decision to move away from the Disaster Management Act as a tool to regulate how we all live our lives, and to decide what norms and standards will be put into play. So, the reopening guidelines are the frame, and we haven't had sight of what the final norms and standards would be.

The above then illustrates that the industry cannot operate under conditions introduced under the COVID-19 crisis, but should rather move away from restricting (and reactive) regulations

and plan for tourism operations taking cognisance of COVID-19 protocols and considerations. The newly introduced norms and standards have been opined to allow for the recovery of the tourism industry, as it redefines the current regulations, particularly the reopening of international borders and the numbers of individuals permitted in MICE venues. These norms and standards would further consider how the country reacts to future pandemics (National Department of Tourism, 2021). COVID-19 revealed the interconnectedness of the world, which has been driven by globalisation, which has implications for widespread impacts of crises. Hopkins (2021) explains that crises operate at intersecting scales and levels, inferring that crisis cannot be contained in a geographic location, but rather shared by multiple locations, should it be characterised by flows that connect different parts of the world (i.e., tourism). This growing realisation led to the inclusion of crisis management, and resilience at the scale of national policy. Currently, South Africa is reviewing and amending the White Paper on Tourism Promotion and Development, an important policy guiding tourism development that was initially developed in 1995. Interviews with some governing officials responsible for this reformulation have explained this process to have resulted from the realisation that the country's tourism development strategy cannot be guided by a policy dated more than 25 years ago, as the context it was set under is significantly different from the current tourism environment. As such, the respondents have underscored the inclusion of crisis management within the policy document:

But most importantly, there has been realisation that the sector has not taken seriously the issue of crisis management in the tourism sector. As I indicated, we have had these shocks here and there, the volcanic eruptions and so, on, which will disturb travel across the globe, maybe for a day or two, and then things go back to normal. But we have not had a pandemic of this magnitude, which grounded almost everyone across the globe. So, one of the most important things that have been identified is that we need to have a crisis management plan or crisis management framework to guide the response, ensure preparedness and management broadly so that we build the resilience of the sector going forward.

If you're not prepared, chances are a lot of businesses will always go down about with. So, crisis management plans and preparations should be in place, this is one of the areas that a department is focusing on now, to ensure that we develop a crisis management plan. Already the department has commissioned work in this area of work and linked to that will be a tourism crisis management committee, that will be responsible for dealing with [a] crisis when it occurs, and it should be inclusive of both government and private sector.

Interestingly, while the respondents acknowledged that the COVID-19 pandemic is responsible for a major part of the change occurring within tourism, it set out the importance of having a policy document that specifically embedded crisis management and resilience building in tourism development. In doing so, there have been several emerging policy considerations that respondents aver to be crucial for considering in the national tourism policy and strategy plans. One such issue has been the importance of insurance:

Another area that forms part of the discussion of this tourism crisis management is the issue of insurance. And there is that discussion that is going on which seeks to suggest that perhaps it should be compulsory for tourism businesses to take out insurance, especially insurances that relate to such crisis. So that when that time comes, they can

be given that relief. I'm sure you are aware that a lot of them have been struggling, there were court cases where some of these insurance industries were reluctant to pay. So, there's also those discussions linked to that issue of insurance in the tourism businesses that are also vitally important. This is what has been identified as critical going forward to ensure that we build a resilient sector.

Similarly, Palrao et al. (2021) averred that many MICE tourism companies, particularly events planners, were not insured for pandemics and have therefore been forced to close. Similar cases can be found within the South African context, evident by the significant closure of tourism establishments in the country. Accordingly, the discussion around mandating insurance policies for tourism businesses may emerge as a long-term strategy to reduce these businesses from the vulnerabilities of their industry, thereby increasing their resilience to future crises. Moreover, the importance of greater technological adoption and innovation was included in the policy. With the increase of the use of technology in tourism, which was fast-tracked with the advent of COVID-19, respondents contend that the emerging policy will consider the support required by the tourism small, medium and micro enterprises (SMMEs):

So, it will be important to look at how these small businesses can be capacitated, how they can be supported to evolve with times, you know [the] technological evolution. Some new players are coming on board in the form of Airbnb and so on. How are these new players going to affect those that have been in the sector, but which are still small, like your bed and breakfast? I would say from time to time, we'll really need to look at these policy adjustments, but also support these small businesses to adapt to these new challenges that are coming up.

Such findings indicate that the use of technology in tourism establishments has currently become a widely accepted standard that SMMEs in South Africa could conform to. It both levels the playing field for tourism enterprises and reveals some inequalities related to the access to technological devices, stable internet connection and capacity to utilise technology to realise business potential fully. Specifically, to the MICE sector, some respondents representing the key supporting organisations outlined capacity to support and bridge the inequalities to be a prominent aspect in their strategy formulation process and have introduced measures to ensure that there is transformation within this sector. Speaking on how this will be supported within the bidding of MICE events, one respondent mentioned:

Then they [convention bureau] are looking at sectors broadly related to philanthropy. They have included that and then there is inclusive growth. A set percentage of the funding needs to go to black-owned SMEs. So, if you get between 100 and 200k, you then need to use 10% and use black SMME that they are going to include in the contractual obligations that they signed with the client.

The manner of transformation within the tourism industry is a highly contentious one as while there have been several interventions by the government in fostering an inclusive industry, there have been some studies that have argued this to be somewhat lacking (Abrahams, 2018; Rogerson & Rogerson, 2021c). Consequently, the results illustrate inasmuch as the emerging policy considerations are focused on recovery and resilience, there are still important issues within MICE tourism development in the country that require continued attention. This ties into a sustainability-focused perspective to tourism post-COVID-19, where Lapointe (2021) has underscored the pandemic had provided a unique opportunity to reconceptualise the growth

pathways and focus on ensuring the regrowth of tourism is measured by sustainability principles. Another example of the planning for inclusive regrowth can be seen below:

And then for regional spread, and this is very going to be very controversial, but if you go to a metropolitan area, Cape Town, Stellenbosch, Johannesburg, Durban and Tswane, you're only going to get 60% of the funding. So, we provide incentives to encourage regional spread, but it didn't influence the decision making. So, we needed to come up with something a lot more aggressive. And this is so if you come, and you haven't decided, we'll give you what you can get - 100% to second tier towns and 60% when you go to metropolitan areas.

The development of MICE tourism in second tier cities had been noted, by the very few studies in this research subject (see for instance Cieslikowski, 2018; Parkins, 2012), as having the potential to spread the benefits associated with this type of tourism as well as reducing the concentration in major cities, such as Johannesburg, Cape Town and Durban. Accordingly, the recovery of MICE tourism is further extended to including lesser-known areas for this market. While the major MICE cities mentioned above may be more suitable for the international MICE market, national and even provincial markets could be exposed to hosting events in small towns within the country. It is important to note that facilities and the capacity to bid and stage these events has been identified as potentially a major obstacle to attaining this goal, the national convention bureau and well as the tourism white paper has identified capacity building as integral to the future development of South Africa.

Conclusion

The current study sought to examine the emerging policies and strategies developed for MICE tourism due to COVID-19. The findings reveal that the immediate policy responses have been geared towards ensuring the survival of the sector through the provision of tourism relief funds and TERS. However, there have been some challenges regarding the accessibility of such funds for the MICE sector. Also, the emerging governing tourism policies and strategies, some of which are still under development, have identified crisis management, greater technological integration, and capacity support as factors building MICE tourism recovery resilience to the current (and future) pandemic. Moreover, the study finds that the pandemic has brought to light the importance of addressing historical inequalities within MICE tourism, specifically the state of economic transformation and geographical spread of MICE business. The current study illustrated the transition of South Africa MICE tourism's policy response, from mitigation to adaptation. The findings, therefore, indicate that while COVID-19 has been an agent of change within MICE tourism in South Africa, it has set the tone for the next phase of MICE tourism development in the country, one of which has been conceptualised to be grounded on adaptation, crisis management and resilience.

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