Kaohsiung Protocol
Strategic Recovery Framework for the Global Events Industry
Dear ICCA Colleagues,

We are pleased and proud to provide you with this final report from the Kaohsiung Protocol process to which many of you contributed. Thank you for your interest in this groundbreaking process to create a strategic framework, focused on our customers, to guide our industry forward. Our intent was to provide you with real time business intelligence based on original research with our clients. That intelligence and subsequent findings and recommendations from the Kaohsiung Protocol Advisory Group and the team at MMGY NextFactor is included here. It provides a list of strategies and key take-aways by sector, including our association colleagues, for you to discuss and potentially implement with your management teams. Globally, no one else in our industry has brought forward this type of futuristic analysis with actionable steps.

The structured methodology was designed to give us a snapshot now, and then the opportunity to repeat the process to see what has changed and what further steps we may need to take in light of new trends identified by our clients and key opinion leaders in our industry. It has also provided us with a roadmap for broader industry collaboration on issues and challenges that are bigger than ICCA which will need all the industry organizations to solve together. The "push" to make that happen must come from all of us invested in our industry to demand our leaders in all the organizations work together to keep our industry vital and relevant to the appropriate governmental decision makers.

Our industry is uniquely capable of driving COVID recovery and ongoing social and economic development and transformation. While this moment in time is difficult, it is also an opportunity to Transform our messages and businesses to evolve with the dynamic changes that are occurring.

There are many people and organizations to thank for making this Kaohsiung Protocol possible: Mayor of Kaohsiung and Government of Kaohsiung City for partnering in a unique hybrid congress and sharing the vision for this protocol; our Kaohsiung Protocol Advisory Group (identified within) for participating and validating the methods and results; our partners at MMGY/NextFactor for the methodology and analysis and unique contributions; the ICCA President, James Rees, and the ICCA Board for their vision of this potential process and product, and their willingness to put a stake in the ground and step into an arena that ICCA hasn't traditionally been in; and finally to the former Board member that guided this entire project from start to finish, the champion of what we could accomplish together, Gregg H. Talley. These individuals and organizations deserve your appreciation for helping to drive our industry and ICCA forward in perilous times.

Let's work together and reach transformation in our industry.

Thank you,

Senthil Gopinath
CEO, ICCA
December 2020 | nextfactorinc.com

Dear Reader,

It is our pleasure to present the Kaohsiung Protocol, a Strategic Recovery Framework for the Global Events Industry. The purpose was to identify: key macro and micro trends affecting our clients and industry; important strategies to consider implementing by sector; and new event success metrics in the future.

This Framework was based on extensive analysis and engagement. We completed more than 30 interviews with industry leaders; surveys of event clients and of the ICCA membership; and several global live virtual events.

We believe that this Framework can guide important strategic discussions about the future of our events industry. The structured methodology was designed to give us a snapshot now, and then the opportunity to repeat the process to see what has changed and what further steps we may need to take in light of new trends identified by our clients and key opinion leaders in our industry.

We would like to acknowledge the strong support of ICCA, including in particular the significant contributions of Mr. Gregg Talley, ICCA lead on this project, We also want to express our gratitude to our Global Advisory Group, which is listed later in the report. Their advice and support have been invaluable.

Our team is looking forward to continuing work with ICCA in the coming months and years ahead on addressing the numerous issues and realities resulting from the current crisis.

We hope you and your organization can benefit from this Framework.

Yours truly,

Paul Ouimet
Partner, President
MMGY NextFactor
Summary

The ICCA Kaohsiung Protocol

The ICCA Kaohsiung Protocol is a strategic recovery framework to guide the global meetings and events industry forward. The Covid-19 pandemic has been a catalyst for accelerating transformation across almost every sector. Old ways of doing business have been replaced by agile innovation, and there’s no turning back.

While we know that face-to-face events will return eventually, there’s plenty of evidence to suggest that they’re going to look and work much differently. For the industry to thrive again in the future, there must be a systemic shift in how clients and suppliers collaborate with each other to deliver real value for all members, attendees and stakeholders.

Four specific themes continually arose during the development of the strategies in the Kaohsiung Protocol framework: engagement, technology, risk and business. Combined, those four themes encompass the most significant opportunities and challenges across the entire event industry ecosystem in our increasingly fluid future.

For event professionals and their partners, all of those themes need to be approached as parts of an integrated whole. Each strategy contributes to, and builds on, the success of others. That systems approach is key to everything.

The future of the events industry is not a debate about face-to-face versus virtual. It’s about building networks and optimizing connections to support personal and professional transformation that drives economic and social progress — regardless of the formats and channels.

How people want to gather and grow together is changing, and as an industry, we need to embrace that fully. As such, the Kaohsiung Protocol provides a starting point for adapting to our new realities and capitalizing on those changes.

A Framework for the Future

The following four pillars in the framework each contain strategies that were crowdsourced from: clients; CVBs; venues; and meeting management, services and transportation companies.

- **Enhanced Engagement & Value**
  The due north for the industry is building events around the unique needs of the end user to improve engagement and deliver customized value year-round.

- **Digital Restructure & Hybrid Events**
  Creating a digital, omnichannel culture across any organization and its value chain will build networks, increase audience reach, and deliver better business intelligence.

- **Shared Risk Management**
  New contractual agreements and insurance products must be developed to ensure risk is evenly managed across all actors.

- **Innovative Business Models**
  A new platform business model and expanded partnerships are required to diversify markets and develop new revenue streams equitably and sustainably.
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**MMGY NextFactor Project Team**

Paul Ouimet, Partner/President  
Greg Oates, SVP, Innovation  
Jim McCaul, SVP, Destination Stewardship  
Shirin Jafari, Manager, Sustainability

**ICCA Lead**

Gregg Talley, President/CEO,  
Talley Management, Inc.

**ICCA**

James Rees, President  
Senthil Gopinath, CEO
Introduction

A Watershed Moment

The global events industry is at a crossroads. We are living during a watershed moment in history when the world stopped. Event professionals will be leading the global efforts to restart it, because that’s what they always do when society needs solutions.

The Covid-19 pandemic is forcing the transformation of face-to-face and virtual events, especially in terms of engagement strategy and business outcomes. However, we can all agree that there are a lot more questions than answers heading into 2021.

As Jenny Ennis, meetings manager at the European Society of Sports Traumatology, Knee Surgery & Arthroscopy Association, said in October 2020: “I feel extremely uncomfortable about our annual congress next year in Milan, and nobody is an expert right now.”

The ICCA Kaohsiung Protocol was developed to fill that gap. It is a framework of integrated strategies to help clients, destinations, venues, event management and support services, transportation companies and other partners collaborate with each other more effectively to define and optimize the future of the global events industry.

The development of the Kaohsiung Protocol included extensive engagement with industry and association leaders to understand how they’re preparing for 2021 and beyond.

That started with MMGY NextFactor developing an Advisory Panel made up of proven leaders across the industry. Together, they developed a list of 30 macro trends in society, and 43 micro trends highlighting shifts in the events industry. That was supplemented with more than 30 individual interviews with industry thoughts leaders, including buyers and suppliers.

Following that, MMGY NextFactor and ICCA hosted a series of indepth surveys and interactive webinars to crowdsource the new strategic priorities across the entire scope of the global event industry.

The foundation of the Kaohsiung Protocol is that framework of interrelated strategies.

The Kaohsiung Congress

In early November, the MMGY NextFactor team shared the initial findings with the ICCA membership during the ICCA Kaohsiung Congress. The annual event was a developed as a hybrid experience with people contributing from around the world.

This report is a culmination of all the research to date. It is designed to be a launchpad for the future of strategic planning across the industry.

Many of the strategies here have been major themes of conversation in the events industry for the last decade. However, the Covid-19 pandemic has forced all of us to be much more aware about how all of these big themes are integrated.

It has also made us much more intentional about delivering more customized value to members and attendees, and greater business outcomes for stakeholders and partners.

The pandemic has highlighted the need to prioritize the end user above all else. The events industry does not exists for itself. That is perhaps the most fundamental shift in the industry this year, globally. All of the strategies in the Kaohsiung Protocol are aligned around that fundamental understanding.
Work Plan

Phase 1:
Advisory Panel & Research

MMGY NextFactor established an Advisory Panel of 25 industry leaders to provide direction for The Kaohsiung Protocol. The team produced two global surveys, with 80 clients and 128 suppliers responding, and it conducted 30+ interviews with high-profile industry members.

Phase 3:
Identify Key Strategies

MMGY NextFactor hosted a series of four webinars to crowdsource event strategies, dedicated to each industry sector: Clients; CVBs; venues; and meeting management, services and transportation companies.

Phase 2:
Identify Key Trends

ICCA and MMGY NextFactor facilitated a hybrid event where ICCA members rank the importance of macro global trends and micro industry trends. Defining the 30 macro trends and 43 micro trends provided the relevant foundation for developing the strategic framework.

Phase 4:
Prioritize Strategies

ICCA and MMGY NextFactor hosted a live event to present the strategies from The Kaohsiung Protocol framework. That was followed with extensive feedback from all sectors of the industry.

Phase 5:
ICCA Kaohsiung Congress

MMGY NextFactor hosted a live event at the hybrid ICCA Kaohsiung Congress to present the initial findings from The Kaohsiung Protocol framework. This report was then developed to capture and share all of the takeaways with ICCA’s membership.

- **80** Clients Surveyed
- **128** Suppliers Surveyed
- **30+** Industry Interviews
- **45** Participating Countries
Advisory Panel

ICCA and MMGY NextFactor wish to thank The Kaohsiung Protocol Advisory Panel for their insight to help define the road forward for the global meeting and events industry.

Julia Swanson
Melbourne Convention Bureau

Geoff Donaghy
ASM Global (ICC Sydney)

Fernando Gorbaran
Messe Frankfurt

Dale Parmenter
DRPG

Carina Bauer
IMEX

Tracy Bury
AC Forum

Nelly Mukazayire
Rwanda Convention Bureau

David Peckinpaugh
Maritz Global Events

Eric Abramson
GL Events

Matthias Schultze
German Convention Bureau

Mike Blackman
Integrated Systems Europe

Heike Mahmoud
Congress Centre Hamburg

Carola van der Hoeff
Int’l Pharmaceutical Federation

Isabel Bardinet
European Society of Cardiology

Alessandro Cortese
European Society for Radiotherapy & Oncology

Juliana Lopez
Cartagena de Indias Convention Center

Patrick Chen
Shanghai CVB

Walter Yeh
Taiwan External Trade Development Council

Gregg Carren
Philadelphia CVB

Tom Reiser
Int’l Society on Thrombosis & Haemostasis

David Blansfield
Northstar Meetings Group

Taubie Motlhabane
Cape Town International CC

Edward Koh
Singapore Exhibition & Convention Bureau

Mahir Julfar
Dubai World Trade Center

Arnaldo Nardone
FIEXPO
Survey Profiles

The 80 clients and 128 suppliers who participated in the two ICCA surveys represent a broad cross-section of event professionals and industry sectors.

Clients

- Association: 58.8%
- Agency: 26.3%
- Corporate: 6.3%
- Other: 8.8%

Suppliers

- CVB: 47.58%
- Venue: 25%
- Meeting Management: 16.9%
- Meeting Services: 4%
- Transportation: 1%
- Other: 5.7%
Client Forecasts

There is little doubt in clients’ minds that the future of the events industry will adopt digital technologies to a much greater degree in the future.

How will the number of hybrid events evolve in the future?

45% Increase greatly
42.5% Increase slightly

How will the number of virtual events evolve in the future?

46.3% Increase greatly
42.5% Increase slightly

How will the number of face-to-face events evolve in the future?

31.3% Decrease greatly
51.3% Decrease slightly
Key Performance Indicators

More than two-thirds of clients worldwide are adapting their metrics of success to assess a broader and evolving hierarchy of performance priorities.

Have your event metrics changed?

70% Yes
30% No

What will be your most important metrics in the future? (pick 3)

74% Attendee satisfaction
66% Attendee engagement
61% Event attendance
54% Business/event objectives realized
50% Stakeholder engagement
28% Risk mitigation
25% Legacy impact in local community
23% Destination/partner support
14% Net promoter score
# Macro Global Trends

The strategic framework developed for The Kaohsiung Protocol was constructed within the context of macro global trends, impacting society and business in general, and all of the micro trends specific to the events industry. Together, they provide a comprehensive perspective for navigating the future of global association events and the destinations where they take place.

This page and the following page identify the 30 macro global trends and 43 micro industry trends, and how they were ranked in importance by both clients and suppliers.

<table>
<thead>
<tr>
<th>Macro Trends (each ranked 1-5)</th>
<th>Client</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Acceleration of digital economy</td>
<td>4.38</td>
<td>4.33</td>
</tr>
<tr>
<td>2. Ongoing challenges with vaccination logistics/distribution</td>
<td>4.2</td>
<td>4.15</td>
</tr>
<tr>
<td>3. Continuation of global recession</td>
<td>4.17</td>
<td>4.03</td>
</tr>
<tr>
<td>4. Exponential increase of remote workers/telecommuters</td>
<td>4.0</td>
<td>3.8</td>
</tr>
<tr>
<td>5. Acceleration of personal tech adoption (e.g. Zoom)</td>
<td>3.97</td>
<td>4.07</td>
</tr>
<tr>
<td>6. Increased awareness of diversity, equity and inclusion</td>
<td>3.93</td>
<td>3.65</td>
</tr>
<tr>
<td>7. Permanent adoption of physical distancing</td>
<td>3.93</td>
<td>3.38</td>
</tr>
<tr>
<td>8. Increased recognition of climate change impacts</td>
<td>3.86</td>
<td>3.85</td>
</tr>
<tr>
<td>9. Acceleration of e-commerce</td>
<td>3.79</td>
<td>3.91</td>
</tr>
<tr>
<td>10. Long-term concerns regarding health and safety</td>
<td>3.73</td>
<td>4.1</td>
</tr>
<tr>
<td>11. Increased concerns related to mental and physical health</td>
<td>3.53</td>
<td>3.8</td>
</tr>
<tr>
<td>12. Increase of AI influencing personal/professional lives</td>
<td>3.53</td>
<td>3.77</td>
</tr>
<tr>
<td>13. Increase in consolidation across all industries</td>
<td>3.52</td>
<td>3.36</td>
</tr>
<tr>
<td>14. Massive disruption of global supply chains</td>
<td>3.52</td>
<td>3.67</td>
</tr>
<tr>
<td>15. Accelerating growth in Asia-Pacific region</td>
<td>3.48</td>
<td>3.48</td>
</tr>
<tr>
<td>16. Spike in SME (small/medium enterprise) closures</td>
<td>3.48</td>
<td>3.67</td>
</tr>
<tr>
<td>17. Rise of ESG (Environmental, Social, Governance) investing</td>
<td>3.41</td>
<td>3.69</td>
</tr>
<tr>
<td>18. Acceleration of workforce upskilling</td>
<td>3.4</td>
<td>3.69</td>
</tr>
<tr>
<td>19. Decimation of urban cores (e.g. offices, hotels, restaurants)</td>
<td>3.38</td>
<td>3.37</td>
</tr>
<tr>
<td>20. Increase in cross-sector convergence</td>
<td>3.34</td>
<td>3.52</td>
</tr>
<tr>
<td>21. Lack of trust in global institutions and leadership</td>
<td>3.31</td>
<td>3.39</td>
</tr>
<tr>
<td>22. Shift of governments investments into clean tech</td>
<td>3.3</td>
<td>3.61</td>
</tr>
<tr>
<td>23. Increased recognition of benefits of smart cities, cars, etc.</td>
<td>3.27</td>
<td>3.55</td>
</tr>
<tr>
<td>24. Shift from shareholder to stakeholder economy</td>
<td>3.27</td>
<td>3.32</td>
</tr>
<tr>
<td>25. Global rise of nationalism</td>
<td>3.21</td>
<td>3.34</td>
</tr>
<tr>
<td>26. Improvement of public-private sector collaboration</td>
<td>3.17</td>
<td>3.49</td>
</tr>
<tr>
<td>27. Increase of adoption of circular/regenerative economies</td>
<td>3.17</td>
<td>3.52</td>
</tr>
<tr>
<td>28. Reversal of globalization to varying degrees</td>
<td>3.03</td>
<td>3.33</td>
</tr>
<tr>
<td>29. Increased leadership at local and regional government levels</td>
<td>2.97</td>
<td>3.38</td>
</tr>
<tr>
<td>30. Increasing awareness that brand purpose is a differentiator</td>
<td>2.93</td>
<td>3.53</td>
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</tbody>
</table>
## Micro Industry Trends

**Micro Trend** (each ranked 1-5)

<table>
<thead>
<tr>
<th></th>
<th>Client</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Growth of hybrid events</td>
<td>4.4</td>
<td>4.41 (1)</td>
</tr>
<tr>
<td>2. Increasing requirement for flexible contractual terms</td>
<td>4.3</td>
<td>4.26 (3)</td>
</tr>
<tr>
<td>3. Evolution of business model for events</td>
<td>4.2</td>
<td>4.11 (7)</td>
</tr>
<tr>
<td>4. Slow return of large events</td>
<td>4.17</td>
<td>4.35 (2)</td>
</tr>
<tr>
<td>5. Increasing awareness of need for more innovative thinking</td>
<td>4.14</td>
<td>4.21 (4)</td>
</tr>
<tr>
<td>6. Increasing opportunities related to digital transformation</td>
<td>4.11</td>
<td>4.13 (5)</td>
</tr>
<tr>
<td>7. Increasing focus on risk mitigation</td>
<td>4.07</td>
<td>4.09 (10)</td>
</tr>
<tr>
<td>8. Evolution of value for sponsors in digital events</td>
<td>4.04</td>
<td>4.11 (9)</td>
</tr>
<tr>
<td>9. Relaxation of travel restrictions</td>
<td>4</td>
<td>3.96 (12)</td>
</tr>
<tr>
<td>10. Permanent loss of corporate travel volume</td>
<td>3.97</td>
<td>3.81 (16)</td>
</tr>
<tr>
<td>11. Decrease in average size of conventions</td>
<td>3.97</td>
<td>4.12 (6)</td>
</tr>
<tr>
<td>12. Growing awareness that F2F numbers pre-Covid-19 won’t return</td>
<td>3.93</td>
<td>3.77 (22)</td>
</tr>
<tr>
<td>13. Increase of production costs</td>
<td>3.86</td>
<td>3.68 (30)</td>
</tr>
<tr>
<td>14. Increasing importance of event design/experiences</td>
<td>3.79</td>
<td>3.92 (14)</td>
</tr>
<tr>
<td>15. Diversification of event planner roles</td>
<td>3.75</td>
<td>3.52 (38)</td>
</tr>
<tr>
<td>16. Increase of controlled event environments</td>
<td>3.75</td>
<td>3.98 (11)</td>
</tr>
<tr>
<td>17. Increase in hotel closures</td>
<td>3.72</td>
<td>3.85 (15)</td>
</tr>
<tr>
<td>18. Understanding that DMO/CVB funding won’t recover for years</td>
<td>3.7</td>
<td>3.77 (21)</td>
</tr>
<tr>
<td>19. Rise of micro events</td>
<td>3.69</td>
<td>3.76 (24)</td>
</tr>
<tr>
<td>20. Increasing awareness that F2F event is just one of many channels</td>
<td>3.66</td>
<td>3.7 (26)</td>
</tr>
<tr>
<td>21. Long-term losses in airlift capacity globally</td>
<td>3.6</td>
<td>4.11 (8)</td>
</tr>
<tr>
<td>22. Shift in delivering on customer needs to #1 priority</td>
<td>3.55</td>
<td>3.8 (17)</td>
</tr>
<tr>
<td>23. Increase of event industry consolidation</td>
<td>3.53</td>
<td>3.59 (35)</td>
</tr>
<tr>
<td>24. Increase of association consolidation and closures</td>
<td>3.48</td>
<td>3.76 (23)</td>
</tr>
<tr>
<td>25. Increasing real-time, 1-to-1 engagement with attendees</td>
<td>3.48</td>
<td>3.65 (33)</td>
</tr>
<tr>
<td>26. Increasing need for targeted social media strategy/metrics</td>
<td>3.48</td>
<td>3.66 (32)</td>
</tr>
<tr>
<td>27. Long-term loss of larger events in midsize cities</td>
<td>3.48</td>
<td>3.8 (19)</td>
</tr>
<tr>
<td>28. Increasing focus on measurable outcomes as primary event value</td>
<td>3.47</td>
<td>3.69 (27)</td>
</tr>
<tr>
<td>29. Trust is the new currency in events</td>
<td>3.45</td>
<td>3.8 (18)</td>
</tr>
<tr>
<td>30. Increased alignment between event strategy and economic development</td>
<td>3.41</td>
<td>3.79 (20)</td>
</tr>
<tr>
<td>31. Increase of collecting data to measure everything</td>
<td>3.4</td>
<td>3.92 (13)</td>
</tr>
<tr>
<td>32. Increase in event venue closures</td>
<td>3.39</td>
<td>3.63 (34)</td>
</tr>
<tr>
<td>33. Increase in bookings for short-term rentals</td>
<td>3.37</td>
<td>3.52 (37)</td>
</tr>
<tr>
<td>34. Increased competition for subventions to win events</td>
<td>3.37</td>
<td>3.71 (25)</td>
</tr>
<tr>
<td>35. Decreasing availability of industry supplies</td>
<td>3.36</td>
<td>3.23 (42)</td>
</tr>
<tr>
<td>36. Acceleration of younger leadership across event sector</td>
<td>3.34</td>
<td>3.4 (40)</td>
</tr>
<tr>
<td>37. Increasing adoption of tiered memberships and pay-to-play models</td>
<td>3.32</td>
<td>3.57 (36)</td>
</tr>
<tr>
<td>38. Increasing consolidation of DMO/CVB, economic development, chambers</td>
<td>3.25</td>
<td>3.69 (28)</td>
</tr>
<tr>
<td>39. Higher overall demand for event space in 2022</td>
<td>3.24</td>
<td>3.67 (31)</td>
</tr>
<tr>
<td>40. Long-term loss of DMCs</td>
<td>3.21</td>
<td>3.68 (29)</td>
</tr>
<tr>
<td>41. Less interest in legacy impacts of events</td>
<td>3.17</td>
<td>2.99 (43)</td>
</tr>
<tr>
<td>42. Rise of large open-air venues</td>
<td>3.14</td>
<td>3.23 (41)</td>
</tr>
<tr>
<td>43. Increasing shortages of staff and contractors</td>
<td>3.1</td>
<td>3.46 (39)</td>
</tr>
</tbody>
</table>
Strategic Recovery Framework

#1 Enhanced Engagement & Value
The due north for the industry is building events around the unique needs of the end user to improve engagement and deliver customized value year-round.

#2 Digital Restructure & Hybrid Events
Creating a digital culture across any organization and its value chain builds networks, increases audience reach, and develops better business intelligence.

#3 Shared Risk Management
New contract agreements and insurance products must be developed to ensure risk is evenly managed across all actors, including buyers and suppliers.

#4 Innovative Business Models
An omnichannel platform business model and expanded partnerships are required to diversify markets and revenue streams equitably and sustainably.
Enhanced Engagement & Value

The purpose of the global meetings and events industry is three-fold. First, it is one of many vehicles for helping organizations achieve their economic, educational, and/or community goals. Second, the industry provides opportunities for the personal and professional development of the people who are affiliated with those organizations. Third, meetings and events are a catalyst for global development and social progress.

The events industry lost sight of its purpose during the past decade of record growth. It evolved into a supplier-focused ecosystem rather than embracing an outcomes-based approach, and it hasn't kept pace with advancements in knowledge sharing and generational shifts with regard to how people want to learn and gather.

Strategies

1. Prioritize the needs of individual members, attendees and stakeholders
2. Develop data tools to assess member, attendee and stakeholder needs
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12. Define generational preferences for live and digital engagement
Enhanced Engagement & Value

Takeaways

1. **The needs of members and attendees are the #1 priority above all other considerations.**

   If the events industry defines its purpose as a platform for delivering real value to organizations, and the people who participate in those organizations’ events, then the overriding focus should be on the quality of value exchanged. How, where, when and what format are secondary. This is the most pivotal shift in thinking required for the future success of the global events industry. In any organization today, customer centricity is the foundation for business growth in the 21st century, defined as delivering on the individual needs of customers by customizing the value exchange based on personal preferences.

2. **Face-to-face events are only one channel to engage audiences and monetize engagement.**

   The future of meetings and events is omnichannel. An “event” is anything where people come together to share and build on their collective knowledge and experience, regardless if it’s in-person or across any kind of digital medium. The challenge for clients moving forward is how to design and orchestrate all of their events in a holistic framework, so the live and virtual experiences complement each other to expand audience reach and increase commercial opportunities across the entire event ecosystem year-round. Likewise, for destination and venues, the opportunities in the future are based on how both reimagine their identities beyond physical places and spaces. Already, we’re seeing many destinations and venues investing heavily in new infrastructure and messaging related to hybrid-virtual knowledge sharing.

3. **New data tools are needed to optimize learning and measure engagement.**

   The only way to prioritize and deliver on the individual needs of members, attendees and stakeholders more effectively is by understanding what those needs are more comprehensively. The event technology exists to provide that data for live and virtual engagement. However, there is a lack of focus, will and commitment across the industry to develop data standards and universal objectives to clearly define and measure business outcomes for both buyers and suppliers.

4. **The 3 big focus areas for younger generations: diversity, sustainability and community.**

   The future of everything has always been born in the wellspring of youth culture. The events industry has grown weary of the conversation around the “millennial mindset,” but it ignores generational shifts at its peril. Today, based on countless studies, it is clear that the inter-related themes of diversity, equity and inclusion; sustainability and resilience; and community building are major priorities for future generations. Technology is a vehicle that provides opportunities to address all three, and where members, attendee and stakeholders can engage with each other in new conversations. The overarching strategy to accelerate and elevate those conversations is based on how organizations align the development of their events, the priorities of their audiences, and local government, economic and community priorities.
Digital Restructure & Hybrid Events

There’s a lot of talk today about how face-to-face events provide a much better learning and networking experience than virtual events. That’s often true, but it’s not always true, and it’s considerably less true than a year ago. As event technology continues to evolve, buyers and suppliers, knowledge sharers and learners, mentors and mentees, and networkers and contacts will continue to move online long after Covid-19 subsides because the business case has been proven in many ways, depending on the event objectives.

The future of the global events industry is omnichannel. During the development of the Kaohsiung Protocol, there were many suggestions that face-to-face events and virtual sessions don’t merge well. And yet, we move through our daily lives navigating our physical and digital worlds seamlessly and intuitively. Takeaway: We have a lot of work before us.

Strategies

1. Develop a digital platform operational model to expand global audiences/partners
2. Reimagine physical locations and spaces as global knowledge sharing hubs
3. Build internal cultural alignment to increase adoption of digital vision
4. Develop digital technology assets and standardize processes
5. Develop in-house digital studios and/or expand digital teams
6. Upskill staff and redefine hiring policies to enhance digital capabilities
7. Adopt e-sport/gaming strategies to energize and monetize hybrid experience
8. Define strategies for increasing interaction between live and virtual audiences
9. Define specific values of face-to-face events that can’t be duplicated online
10. Develop best practices for hybrid to educate members, attendees and stakeholders
11. Develop a full ecosystem of event tech providers
Digital Restructure & Hybrid Events

Takeaways

1. **Organizations must embrace a digital innovation culture to be relevant in the future.**

   The biggest challenge for many organizations as they develop their strategy for the future is their culture. The only way for any organization to grow effectively today is for every level of leadership to embrace a digital mindset, but there’s immense pushback across the industry. The events industry has lamented the scourge of technology as an evil force that will supplant face-to-face events for more than two decades. In some ways, especially following Covid-19, technology will replace some in-person engagement, but the biggest opportunities for industry growth and client engagement are based in a digital future — just like in every other sector.

2. **Destinations and venues are evolving as global knowledge sharing platforms.**

   Association clients are seeking a broader availability of sector knowledge and potential partners, members and sponsors beyond the geographical borders of any destination. Covid-19 has accelerated how progressive destinations and venues are rethinking their identities beyond physical places and spaces. They’re evolving as knowledge sharing hubs with networks expanding locally and globally to provide greater value for clients in our global digital economy. Face-to-face events will return someday, but the destinations and venues that expand their value proposition as innovation distribution channels will have a competitive advantage in that future.

3. **Hybrid events increase audience reach, revenue, and face-to-face attendance.**

   Hybrid events add an additional virtual layer of programming and engagement to a face-to-face event. The ratio between the digital and in-person experience can vary widely. When done well, the virtual event can engage audiences globally, some of whom might never have attended in-person, and they therefore they can increase membership and revenue. Moreover, the virtual sessions are also promotional vehicles to drive attendance to subsequent face-to-face events.

4. **There is a major need for a new digitally literate workforce.**

   Clients and every supplier organization need greater digital capabilities today, and the demand is only going to continue to grow in the near and long term. Today, much of the industry can’t even agree on what a hybrid industry is. Therefore, to meet the needs of the future, stakeholders across the events industry must come together to develop the training and education required for the next generation workforce in event technology.
For the business event industry to be successful in the new normal we will have to find ways to produce our events that still benefit all of the stakeholders but yet which may need to be very different. Clients and their boards will be looking to minimize risk in an era of greater uncertainty. This is also true of destinations, venues and suppliers. Flexibility, transparency and partnership remain key, but even to a greater degree.

Event Insurance is an enormous issue that we will have to collaborate on across our industry and with the carriers themselves. If you can get event insurance, it will be significantly more expensive with an ever increasing list of exclusions. We need every sector to approach their relevant industry association to say, “find a way to fix this and/or lets get creative!” ICCA has a role to play, and so too does every industry organization.

**Strategies**

1. Advocate for greater collaboration to explore shared opportunities
2. Redefine contract language in light of new realities (attrition, minimums, etc.)
3. Spread risk across all actors: buyers, suppliers, vendors, etc.
4. Design flexible contractual models based on external factors
5. Develop research to show legacy impacts of events
6. Redefine payment terms
7. Seek public sector support and collaboration
8. Enhance onsite crisis management plans
9. Develop integrated health, safety and security protocols
10. Ensure everyone pays for the value they receive
Shared Risk Management
Takeaways

1. **Risk must be shared to some degree by every party affiliated with an event.**
   
The event insurance market is broken. Our industry needs to collaborate to find creative ways to fix it to help us spread the risk appropriately. We need to engage with the carriers and/or consider creative solutions like self insurance, etc.

2. **Transparent and flexible negotiations will help deliver realistic solutions for all parties.**
   
   As events return and evolve so too will the contracts need to reflect reality and realistic expectations and commitments. Organization boards and leaders will prioritize risk mitigation to a greater degree than ever before. Destinations, venues and suppliers that understand and react to this better will thrive.

3. **The event model is broken. Who pays for what?**
   
   It is time to get real about the flow of money in our industry. Are the right parties paying for the right things in a sustainable way? Many would argue that this is broken, and now is the time to address it. For instance, how much more can we expect exhibitors/sponsors to pay to offset event costs or registration? How transparent, really, is the commission model across our industry — is it sustainable?

4. **The need for comprehensive health and safety protocols will exist long after Covid-19.**
   
   As with terrorism, we are again seeing a patchwork approach across borders and within destinations related to health and safety. Since this will remain the number one concern of attendees and thus organizers, we will need to better rationalize and integrate the approaches. The destinations that do this better and partner more effectively within the destination and with organizers will attract more business.
Innovative Business Model

Covid-19 has exposed gaps and weaknesses within our industry and every other sector. How we respond as individual associations, public and private entities in our industry will determine our future success. Will the association model survive without innovation in governance, relevance, delivery, access and outcomes? Will current destination and venue/supplier models survive in a more digitally enabled, sustainability focused event industry?

From a tech perspective, Zoom has become the Napster/Netflix of the events industry where digital platforms are making it easier to share, sell and consume information. That provides opportunities to customize content, monetize programming and expand revenue streams for much bigger audiences. The second transformational shift is legacy, where event development aligns with local government and community priorities. When destinations, venues and associations can show elected officials how events support the growth of priority sectors, there’s a business case for government support.

Strategies

1. Develop and diversify business models (tiered subscriptions, pay-to-play, etc.)
2. Leverage digital tools to expand networks of members, attendees and stakeholders
3. Diversify market opportunities, including domestic and underserved sectors
4. Improve e-commerce capabilities to sell content and products
5. Promote destination/venue based on abilities to deliver networks to clients
6. Repurpose venues for new market segments (sports, social, etc.)
7. Develop ancillary model to sell add-on value pre/post, like hotels, airlines, etc.
8. Collaborate with public sector to co-create legacy outcomes
9. Re-examine cost allocations for core/non-core activities
10. Evolve from services provider to strategic consultant
11. Redefine sponsor and exhibitor relationships
12. Expand engagement with sustainability organizations
Innovative Business Model

Takeaways

1. **Increase year-round revenue by customizing value for different audience segments.**

   Every association and all event stakeholders should be able to customize how they deliver content and education to a more diverse variety of partner and audience segments. This is fundamental for driving incremental revenue year-round by developing tiered subscriptions, pay-to-play engagement, dynamic pricing incentives, personalized programming, etc. All of that is based on developing more sophisticated digital tools to create a platform business model where associations and stakeholders have greater opportunities to reach more existing and potential members and customers.

2. **Increase year-round revenue by diversifying markets and ancillary revenue streams.**

   Hotels, airlines, credit cards, esports and many other industry verticals developed partnerships long ago to sell ancillary products and services to their captive audiences. They’ve evolved as aggregators that bundle customized offerings based on an indepth understanding of individual customer preferences. The global meetings and events industry can leverage the same strategies and technologies to move in the same direction. Also, destinations and venues are exploring and developing new business markets to capitalize on.

3. **Universal payment and smart e-commerce technology drive spending and conversion.**

   It’s still a bit of a Wild West in the event technology space where both event professionals and members/attendees are overwhelmed with noise and underwhelmed with poor user experiences. It’s still a challenge to register for events online and seamlessly navigate the event journey, and it’s still difficult in many cases to buy products and services online. The more friction that the industry can remove from the purchase journey, the more effective it will be converting business.

4. **Public sector support is based on legacy impact.**

   Aligning event development with community and economic development is key to earning public sector and/or community support. As an industry, we have increasingly focused on the long-term (legacy) impacts that face-to-face events can produce in the communities that host them. However, little has been done to educate more of the industry about how to engage the public sector to define shared priorities and develop shared outcomes. It is incumbent on the industry to develop best practices with clear case studies that show measurable benefits.
The Path Forward

The mission behind the Kaohsiung Protocol is to provide a critical reference for how we work together across the entire scope of the global meeting and events industry to drive systems change at every level.

We see that mission evolving among the three following areas of focus: Advocacy, Collaboration and Innovation.

Advocacy

The 2020 shock to our industry proved once again our collective failure to effectively convey the full value of business events to government.

We are more than just another industry hard hit by the pandemic. We are a key to recovery and ongoing economic and social transformation that will be even more vital in the next few years.

While we have perfected our direct and indirect impact, we have not been able to develop standards of measuring the true legacy of business events worldwide. Both halves of the story make the whole. It is not an either/or dynamic. It is “yes, and” proposition that we as an industry need to own.

We must take this opportunity to develop those standards of measurement that all destinations can use, thereby enabling us to speak with one voice around the globe.

ICCA is ready to join with our industry colleagues to create or perfect these measurement models, share them and then get “on message” in promoting the great value of business events.

Collaboration

As noted above, for our advocacy to be most effective it will have to be collaborative, with all our industry organizations speaking from the same page. Collaboration is the only way we will solve many of the issues identified in the Kaohsiung Protocol Strategic Framework. To mitigate and share the risk, we will need new models agreed by all the sectors. This is urgent to get our industry back on its feet.

ICCA has reached out to our sister organizations to engage in this effort with or without the global insurance carriers to find a path forward. We may have to get creative, but that is what these times call for. Raise your voice so your industry organizations are engaging to solve our key challenges.

Innovation

Just as solving our risk mitigation issue will take some creativity, there are other aspects of our pre-Covid-19 industry model that could benefit from a re-think. As one industry leader said, “Would we build it back the same way? What if we thought like a start-up?” The Kaohsiung Protocol Advisory Group is doing a deeper dive into this innovation imperative. We will be rolling that out in 2021, and we’ll be including the wider industry in this thought experiment.

What would we fix or do differently? How are we really going to innovate to address the emerging themes coming out of Covid-19 and our collective “pause”? Will we, should we, just “snap back” to business as usual or can it be a “better business events industry” that maximizes our impact, legacy and value to all stakeholders?
ICCA and MMGY NextFactor are continuing to work together to develop a detailed and objective model to assess a destination’s ability to host global business events.

The assessment will be based on a deep dive into the four key strategic pillars identified in the Kaohsiung Protocol Strategic Recovery Framework:

1. Enhanced Engagement & Value
2. Digital Restructure & Hybrid Events
3. Shared Risk Management
4. Innovative Business Model

Further Details

The new assessment model is scheduled to roll out in Q1 of 2021. It will originally include virtual assessments and workshops based on a technical peer review by the project team and a survey of meeting planners.

For more information, contact:

Paul Ouimet
Partner/President, MMGY NextFactor
pouimet@nextfactorinc.com

The 2020 ICCA Hybrid Congress is history and 2020 is nearly over (thank heavens!).

Through all this turmoil and uncertainty, we created a legacy and a roadmap for you and your management teams. Thanks to our partners at MMGY NextFactor, we have research, a strategic framework, and thought leadership to help you navigate 2021 to better partner with your association clients.

This strategic framework applies to each ICCA sector — just slightly differently from your point of reference. Even for our association colleagues, there are many ideas and takeaways for consideration.

It has been a privilege to work on this project with the ICCA Team, our Global Advisory Group and the team at MMGY NextFactor.

Thank you!

Gregg H. Talley, FASAE, CAE
President & CEO
Talley Management Group, Inc.
19 Mantua Road, Mt. Royal, NJ 08061 USA
P: +1 856.599.4690 M: +1 856.366.3647
E: gtalley@talley.com
www.talley.com
Appendice

During the development of the Kaohsiung Protocol, we looked at how the strategies applied to each of the primary sectors in the meetings and events industry: Clients, CVBs, Venues, and Meeting Management, Services and Transportation companies (MST). The results were somewhat surprising in that the vast majority of strategies applied to all sectors.

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Kaohsiung Protocol

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