

Event Evaluation:

**Theory and Methods for
Event Management and Tourism**

Donald Getz, PhD.



Goodfellow Publishers Ltd

(G) Published by Goodfellow Publishers Limited,
26 Home Close, Wolvercote, Oxford OX2 8PS
<http://www.goodfellowpublishers.com>

British Library Cataloguing in Publication Data: a catalogue record for this title is available from the British Library.

Library of Congress Catalog Card Number: on file.

ISBN: 978-1-9113-9665-9

The Events Management Theory and Methods Series

Copyright © Donald Getz, 2018

All rights reserved. The text of this publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without prior permission of the publisher or under licence from the Copyright Licensing Agency Limited. Further details of such licences (for reprographic reproduction) may be obtained from the Copyright Licensing Agency Limited, of Saffron House, 6–10 Kirby Street, London EC1N 8TS.



Design and typesetting by P.K. McBride, www.macbride.org.uk

Cover design by Cylinder

Printed by Baker and Taylor, www.baker-taylor.com

Contents

Introduction to the Events Management Theory and Methods Series	vii
Preface To Event Evaluation	ix
1 Basic Concepts and Definitions	1
2 Value, Values and Evaluation	14
3 Theory	24
4 A Model of the Evaluation Process	37
5 Measures, Methods and Planning an Evaluation Project	48
6 Establishing the Evaluation System	61
7 Goals and Goal Attainment	70
8 Evaluating the Organisation: (I)	83
9 Evaluating the Organisation (II)	97
10 Evaluating Visitors and Experiences	109
11 Quality Evaluation	122
12 Evaluating Human Resources	134
13 Evaluation in Different Types of Planned Events	147
References	163
Index	173

List of Figures

1.1: Value perspectives and major evaluation challenges	6
1.2: Value perspectives and challenges (continued)	7
1.3: Value perspectives and challenges (continued)	9
1.4: Value perspectives and challenges (continued)	12
2.1: Value perspectives and challenges (continued)	15
2.2: Value perspectives and challenges (continued)	18
2.3: Value perspectives and challenges (continued)	19
2.4: Value perspectives and challenges (continued)	21
3.1: CIPP applied to a charity event	28
3.2 : Evaluation complexity model	29
3.3: A systems model	34
4.1: Major considerations in the evaluation process	38
5.1: Evaluator's Toolbox: Content, website and social-media analysis	51
5.2: The Evaluator's Toolbox: Checklists	53
5.3: The Evaluator's Toolbox: Evaluation models and applications	56
5.4: The Evaluator's Toolbox: Logic models	58
5.5: Logic model illustrated	60
6.1: Modified balanced scorecard concept for event management and event tourism	65
6.2: Generic strategy map structure	66
7.1: Overcoming tunnel vision	72
7.2: The Event Compass - Concept	74
7.3: Sample Event Compass radar graph	76
7.4: The example of the organisational domain	77
7.5: Sources of information, data required and methods	80
8.1: A framework for evaluating the event organisation	84
8.2: Suggested customer-focus goals and sample KPIs	86
8.3: Leadership goals and KPIs	86
8.4: Engagement goals and KPIs	86
8.5: Process goals and KPIs	87
8.6: Improvement goals and KPIs	87
8.7: Decision-making goals and KPIs	88

8.8: Relationship management goals and KPIs	88
8.9: Ownership, mandate, business model and governance goals and KPIs	89
8.10: Administration goals and KPIs	91
8.11: Planning goals and KPIs	93
8.12: Root-cause and impact forecasting combined	95
8.13: The Evaluator's Toolbox: Ishikawa and Fishbone diagrams; decision trees	95
9.1: Design goals and KPIs	98
9.2: Information and knowledge management goals and KPIs	99
9.3: Financial management and business planning goals and KPIs	100
9.4: Risk management goals and KPIs	102
9.5: Human resource management goals and KPIs	103
9.6: Marketing and communication goals and KPIs	104
9.7: Sustainability and greening goals and KPIs	105
9.8: Social responsibility goals and KPIs	107
9.9: Life-cycle goals and KPIs	108
10.1: The Evaluator's Toolbox: Attendance evaluation	111
10.2: The Evaluator's Toolbox: Visitor profiles	111
10.3: The Evaluator's Toolbox: Motivation and benefits sought	112
10.4: The Evaluator's Toolbox: Activities and spending	113
10.5: The Evaluator's Toolbox: Experience design and evaluation tools	114
10.6: Participating in the New York City Marathon	119
10.7: Observational guidelines for events and festivals	120
10.8: Key elements of the event experience	121
11.1: Visitor experiences and satisfaction	123
11.2: SERVQUAL dimensions	124
11.3: The Evaluator's Toolbox: Five-Gaps model	126
11.4: The Evaluator's Toolbox: Importance-Performance Evaluation	127
11.5: Importance-Performance Illustration	128
11.5: The Evaluator's Toolbox: The service map	129
11.6: Crowd management and control	131
12.1: Human resources planning and management, goals and KPIs	135
12.2: The Evaluator's Toolbox: Measuring volunteer motivation	137
12.3: The Evaluator's Toolbox: Dissatisfaction and commitment	138

12.4: A hierarchical model for evaluating training effectiveness.	139
12.5: Evaluation of training effectiveness, goals and KPIs	140
12.6: HR performance management goals and KPIs	141
12.7: Evaluator's Toolbox: Rating scales in performance evaluation	143
12.8: The Evaluator's Toolbox: Sample critical incident report	145
13.1: Business events, private functions, and key evaluation challenges	148
13.2: Goals and KPIs for meetings, conventions and congresses	150
13.3: The Evaluator's Toolbox: Conversion rate	151
13.4: The Evaluator's Toolbox: Sample attendee evaluation form	152
13.5: Goals and KPIs for charity events	153
13.6: Goals and KPIs for exhibitions	154
13.7: Goals and KPIs for corporate events	155
13.8: Festivals and cultural celebrations, key evaluation challenges	156
13.9: Goals and KPIs for festivals and cultural celebrations	157
13.10: Arts and entertainment key evaluation challenges	157
13.11: Arts evaluation goals and KPIs	159
13.12: Goals and KPIs for ethnic and multicultural celebrations	159
13.13: Sport events, key evaluation challenges	160
13.14: Goals and KPIs for participation sport events	161
13.15: Goals and KPIs for spectator sport events	162

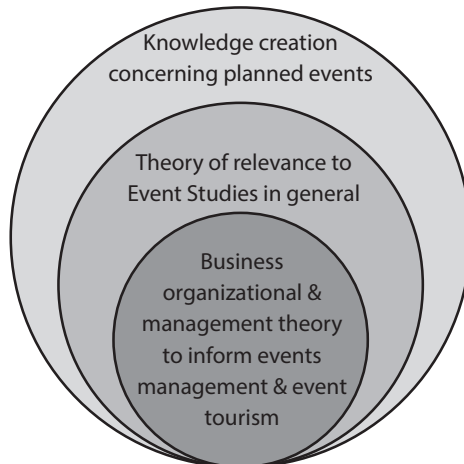
Introduction to the Events Management Theory and Methods Series

Event management as a field of study and professional practice has its textbooks with plenty of models and advice, a body of knowledge (EMBOK), competency standards (MBECS) and professional associations with their codes of conduct. But to what extent is it truly an applied management field? In other words, where is the management theory in event management, how is it being used, and what are the practical applications?

Event tourism is a related field, one that is defined by the roles events play in tourism and economic development. The primary consideration has always been economic, although increasingly events and managed event portfolios meet more diverse goals for cities and countries. While the economic aspects have been well developed, especially economic impact assessment and forecasting, the application of management theory to event tourism has not received adequate attention.

In this book series we launch a process of examining the extent to which mainstream theory is being employed to develop event-specific theory, and to influence the practice of event management and event tourism. This is a very big task, as there are numerous possible theories, models and concepts, and virtually unlimited advice available on the management of firms, small and family businesses, government agencies and not-for-profits. Inevitably, we will have to be selective.

The starting point is theory. Scientific theory must both explain a phenomenon, and be able to predict what will happen. Experiments are the dominant form of classical theory development. But for management, predictive capabilities are usually lacking; it might be wiser to speak of theory in development, or theory fragments. It is often the process of theory development that marks research in management, including the testing of hypotheses and the formulation of propositions. Models, frameworks, concepts and sets of propositions are all part of this development.



The diagram illustrates this approach. All knowledge creation has potential application to management, as does theory from any discipline or field. The critical factor for this series is how the theory and related methods can be applied. In the core of this diagram are management and business theories which are the most directly pertinent, and they are often derived from foundation disciplines.

All the books in this series will be relatively short, and similarly structured. They are designed to be used by teachers who need theoretical foundations and case studies for their classes, by students in need of reference works, by professionals wanting increased understanding alongside practical methods, and by agencies or associations that want their members and stakeholders to have access to a library of valuable resources. The nature of the series is that as it grows, components can be assembled by request. That is, users can order a book or collection of chapters to exactly suit their needs.

All the books will introduce the theory, show how it is being used in the events sector through a literature review, incorporate examples and case studies written by researchers and/or practitioners, and contain methods that can be used effectively in the real world. Online resources will include annotated bibliographies, additional resources, and for teachers an instructor's manual and set of power-point slides.

Preface To Event Evaluation

Key objectives of the book:

- 1 Inform readers on evaluation theory and methods for events and event tourism, including key concepts and definitions.
- 2 Discuss key evaluation challenges for events and event tourism.
- 3 Provide a comprehensive evaluation system that can be fully integrated into event and tourism organisations.
- 4 Develop professionalism for evaluators in these fields.
- 5 Recommend the goals, key performance indicators and methods for evaluation.
- 6 Connect readers to the research literature pertinent to evaluation.

Event and tourism organisations and event managers need to implement a continuous process of evaluation in order to become learning organisations, to achieve their goals, and to meet all standards that are applicable. Some funding bodies insist that event organisers meet performance standards in order to qualify, while others demand comprehensive evaluations and public accountability. In these environments, a comprehensive evaluation system becomes essential, as does professionalism by evaluators.

Most evaluation at the level of a single event is related to problem solving and support for decision making, and these require fairly straightforward data collection techniques. More complex policy and programme evaluations that require determination or evidence of goal attainment can be approached through theory-based evaluations or logic models, and these are covered in this book. The biggest challenge of all is to determine the worth or value of an event, programme or policy, and a great deal of advice is provided on that challenging task, with emphasis on clarifying various perspectives on value.

In this book impacts and impact assessment are introduced, but a separate impact assessment book will provide details on methods for measuring and evaluating social, cultural, ecological, and economic impacts of events, as well as those relating to the built environment. That is where most of the tourism issues arise.

What this book is not

This book is not about research methods, it only introduces the methods and measures needed by evaluators; statistics are completely avoided. Evaluation has to be based on good research much of the time, so the evaluator's skills have to include research methods. On the other hand, people and organisations evaluate qualitatively all the time, in making judgements, giving advice on how things can be improved, and basing decisions on available information. Many events and programmes are valued intrinsically, based on cultural and personal values, for which research and metrics are not necessarily wanted or required.

The simple techniques explained in this book, such as checklists and systematic observation, can be used by any evaluator, but the more complex ones require a foundation in research methods. Several books are available specific to tourism, sport, leisure and events.

Some relevant books on research and methods

Getz, D. and Page, S. (2016). *Tourism Studies* (3d.ed). London: Routledge.

Getz, D. (2013) *Event Tourism*. NY Cognizant.

Long, J. (2007). *Researching Leisure, Sport and Tourism* (2d ed). Sage.

Richards, G., & Munsters, W. (2010). *Cultural Tourism Research Methods*. Wallingford, UK: CABI.

Smith, S. (2010). *Practical Tourism Research*. Wallingford, UK: CABI.

Veal, A.J. (2017). *Research Methods for Leisure and Tourism*. Pearson.

Aknowledgements

Books do not get written on a blank slate, there are always those whose important contributions must be acknowledged. First, special thanks go to two contributors of case studies: Colin Beard (Sheffield-Hallam University) and Richard Shipway (Bournemouth University). Critical parts of this book have their origins in work related to development of the Event Compass, a project that occurred under the auspices of Mid Sweden University in Ostersund, with Robert Pettersson as team leader. Myself and Steve Brown from South Australia have acted as advisors, and we all contributed to the published article on evaluation that is cited herein.

Some ideas and material are based on a major, two-year research and development project funded by BFUF – the research and development foundation of the Swedish Hospitality and Tourism Industry. The project was directed by and for RF, the Swedish Sport Confederation, to improve competency, sustainability and competitiveness in the sport events sector. However, the recommendations arising from this project, in the form of guidelines, can be applied to all events and event tourism situations.

My previous books have provided inspiration and material, all the way back to the first one entitled *Festivals, Special Events and Tourism* (1991). *Event Studies* (third edition, co-authored with Stephen Page in 2016), *Event Management and Event Tourism* (Cognizant, 2005) and *Event Tourism* (Cognizant, 2013) provide a considerable amount of background and elaboration.