

1 Basic Concepts and Definitions

Learning objectives

- Learn why evaluation is essential in professional practice.
- Understand why impact assessment is not necessarily evaluation and why impacts do not equate with benefits.
- Understand how evaluation for events and event tourism is unique.
- Appreciate how different types of events pose unique evaluation challenges.
- Be able to conduct evaluations that implement the event body of knowledge (EMBOK), meeting and business events competency standards (MBECS) and other pertinent standards.
- Know the standards for professional evaluators and competent evaluations.

1.1 Introduction

To start thinking about evaluation of events and event tourism, consider these four challenging scenarios:

- 1** An event manager wants to obtain certification as a sustainable event, but the cost and necessity of doing so is in doubt. The event has data on its energy, water and waste processes, but what other information is needed? What specific evidence will be sufficient to help make the right decision? What arguments can be used?
- 2** Customers at a festival are unhappy, year after year attendance is dropping, and the financial viability of the event is threatened. The owners ask an evaluation professional to help determine the causes and recommend solutions. How should this evaluation project be designed to help save the event?
- 3** A corporation wants to create an event to enhance its brand and develop a community of loyal customers. How exactly should evaluation be built into the design, organisation and operations of this new event?
- 4** Local governments assist events in many ways, often including a partnership with tourism and hospitality agencies to bid on sport events and conventions, and thereby generate tourism impact. They also seek to foster social integration and boost culture through programmes of festivals and celebrations. In

creating and managing these ‘portfolios’ of events, serving many different interest groups with sometimes complimentary and sometimes conflicting goals, how do governments determine which events or types of event best meet their goals? What is each event worth?

Scenario 1 suggests the need for a monitoring system to inform strategy and decisions on going green, being sustainable and getting certified. Monitoring and data collection are essential for planning and decision-making, and knowing what data to collect and how to analyse data to facilitate decision-making are evaluation skills. As to the nature of evidence and how to make arguments, the professional evaluator must combine technical skills with knowledge of how decisions are made.

Scenario 2 describes the context for many event evaluation projects – to identify and solve problems. Sometimes the evaluation is done internally, or by consultants and external stakeholders. If the event in the scenario has sponsors, they might very well want to abandon the festival, or perhaps they will insist on an impartial evaluation with the hope of getting it back on a successful track. Determining the cause of a problem is one thing, but making recommendations to the owners for a solution requires an even higher level of problem-solving.

Scenario 3 gets to the necessity of building evaluation into events right from the beginning, with data collection, monitoring, analysis and decision-support being fully integrated in design and all management functions. The evaluator has models for this kind of system, and knows how to implement evaluation to ensure success.

Scenario 4 deals with event portfolios, tourism, and complex evaluations that examine impacts and the effectiveness of strategies. This type of evaluation gets to the heart of ‘why and how’ events are valued. How do different stakeholders value events, and how can anyone answer the question “what is an event worth”?

By the end of the book readers should be able to answer the questions posed in these scenarios – they represent the essence of event and event-tourism evaluation.

Evaluation is an essential management function of information gathering and feedback through which processes can be improved, goals more effectively attained, and by which organisations can learn and adapt. To ‘evaluate’ is also to place a value on something, or to pass judgment on its quality, effectiveness or worth. Evaluation occurs within policy, planning and decision-making processes and is therefore often political in nature.

Evaluation is *applied*, meaning it always has a purpose. The research done to develop theory is not evaluation, but theory can be important to the evaluation process. When students learn research methods and statistics they are not learning how to do evaluation, but are mastering tools that can be used by evaluators.

Despite recognition of evaluation’s vital role in policy making, managerial improvement and event design, it has been a minor theme in the literature on

planned events. Clifton et al. (2012: 89), following an evaluation of festivals in the UK, argued that “in a culture of evidence-based decision-making, reliable, and robust evaluation is also essential.” Their review concluded that serious weaknesses occurred in the context of evaluating public policy initiatives related to events: a lack of prioritization, advocacy presented as evaluation, and poor quality reporting; complex and politically sensitive objectives are difficult to objectify, while evaluation itself has been under-resourced or viewed as optional.

Impact assessment is a special case of evaluation. When events or programmes are designed to achieve certain outcomes (or impacts), a goal-attainment evaluation is required. The impact assessment might become part of determining the worth of the event or programme, alongside other considerations such as cost-benefit evaluation, opportunity costs and alternatives, and stakeholder opinions. Economic impact assessment has dominated the tourism literature, but there is evident a paradigm shift towards taking a longer-term perspective on the value of events and their legacies within a triple-bottom-line framework. This concern is now expanding to consider managed portfolios and entire populations of events, which compounds the evaluator’s challenges. In this book the discussion of impact assessment is commenced, but a separate book will be devoted to the many complex theories and issues involved.

Evaluation of organisations, personnel and event quality, and event experiences is a key issue in the planned-events sector. It is of critical importance to ensure success from the multiple perspectives of owners, producers, customers, and other stakeholders. Increasingly, evaluation is tied to certification, which is in itself required by many funding agencies and by those granting rights to bid on and produce events. Evaluation is at the heart of sustainability, as without it organisations cannot learn and improve nor can they be held accountable for costs and benefits.

Event evaluation continues to evolve, expand, and become more complex as the discourse on events and event tourism evolves. The basic applications remain intact, including placing a value on events and their sub-elements through visitor satisfaction or return on investment (ROI) measures, and the usual methods remain important, such as visitor satisfaction or economic impact assessment. But event evaluation must now meet much broader objectives including sustainability (in itself a complex matter), encompassing questions of social responsibility, cultural and environmental costs and benefits.

1.2 Unique aspects of planned events and event tourism

Planned events are all different, with unique evaluation questions and practical challenges. In Chapter 13 evaluation issues and methods related to the main types of events are examined, but in this introductory chapter some fundamentals are presented. A complete discussion can be found in the book *Event Studies* (third edition by Getz and Page, 2016).