

# Event Impact Assessment Instructor's Manual

## Introduction

This is the instructor's manual produced to accompany the book *Event Impact Assessment: Theory and Methods for Events and Tourism*, by Donald Getz, 2018, published by Goodfellow Publishers.

This manual and the accompanying illustrations are provided for the private use of instructors. The figures from the text are available for downloading as a PowerPoint file to those instructors adopting the book, but not the additional ones in this manual. Instructors should find photos and illustrations to use in the classroom, and I have included some downloaded extras in this document that cannot be circulated beyond the classroom.

## The Author

**Donald Getz** is Professor Emeritus, the University of Calgary. In 2010 Professor Getz retired from full-time academic life in the Haskayne School of Business, but continued part time until 2015 at the University of Queensland, Sweden (University of Gothenburg) and Norway (University of Stavanger).

He continues to research and write, work as a management consultant, and is affiliated with Linnaeus University in Sweden. In addition to a broad interest in event and tourism studies, areas of expertise include wine and food tourism, evaluation and impact assessment, consumer research and special-interest travel. Professor Getz co-founded, and was an early Editor-in-Chief of the journal *Event Management*, founded in 1993.

Donald is author and co-author of a number of books that provide background to the current book and the series in which it is published, including *Event Management and Event Tourism* (Cognizant, 2d. ed. 2015); *Event Tourism* (Cognizant, 2013), and *Event Studies* (3d. ed. with Stephen Page, Routledge, 2016).

Prof. Getz worked with Goodfellow Publishers Ltd. to create this new series to fill major gaps in the literature, namely applying mainstream management theory and methods to events and tourism. Each book starts with theory, including models, frameworks, constructs and principles, then illustrates how methods that have become important tools elsewhere can be applied to events and tourism management.

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## Teaching Evaluation and Impact Assessment

I have always believed that evaluation and impact assessment should be taught as integral parts of event and tourism management degree programmes, largely because there are obvious weaknesses in professional practice. As well, as I often taught planning (my first degree was in urban and regional planning), evaluation and impact assessment are integral to the process of planning.

Creation of this new book series provided the opportunity for me to write two companion books on these important subjects. This first one provides the foundations, being theory and methods from mainstream professional evaluation. This second book builds on evaluation and examines the many facets of impact assessment as applied to events and tourism.

Ideally, the graduate of event and tourism management degree programmes has had courses in methodology (within a philosophical context covering epistemology and ontology) research methods and statistics, to which evaluation and impact assessment are complimentary. These subjects can also be taught as professional or executive development courses for practitioners, and of course at the graduate level they are also appropriate.

The two books can be combined, but it is recommended that learners start with the basics of evaluation theory and methods before progressing to the more difficult matter of impact assessment and how it can be used within evaluation. There is minimal overlap between the books, and they can stand alone, but it does not really make sense to study impact assessment without the evaluation context. After all, why are IAs done if not to inform decision making?

Elements of evaluation and impact assessment should be introduced into practical management subjects, especially event planning and design, financing, logistics, human resources, and marketing. Relevant issues will arise in policy discussions. At a minimum, graduates should be able to apply concepts and methods from these companion books to their other studies.

In *Event Evaluation* I provided a 'complexity model' to help justify the separation of the two books, although there is also the very practical matter of making the books short enough to be readable and the material manageable in one typical teaching term. Most evaluation occurs at the technical level of problem solving and decision support, ranging from data collection and monitoring to figuring out problems such as why marketing is not working, attendance is falling, costs are mounting, and what to do about it. Human resource issues no doubt account for much evaluation effort, including performance evaluations. Visitors have to be surveyed, and stakeholder input obtained. Goals are set and some evidence has to be found to support claims of goal attainment - or the evaluator's task becomes determining why failure or inefficiencies occur. This is what I mean by "technical" evaluation.

In this *Impact Assessment* book the challenges being considered are much more complex politically, theoretically and methodologically. Can you prove that your event, or tourism, generates the benefits desired? Is it worth the costs and negative impacts created along the way? Who benefits and who pays? What evidence supports your claims that goals are being achieved, and is that sufficient justification to continue a grant or support?

What about long-term, cumulative impacts within a managed portfolio of events that are intended to make a positive contribution to the sustainable, liveable city? How does one even go about starting a project like that?

## **Pedagogy**

Learning styles should be taken into account when designing any course. Students easily get bored with lectures, even when they are based on an easy-to-read text and a nice set of PowerPoint slides!

Students are going to learn more by doing than by listening, hence the rise of experiential learning, simulations, internships and reflective professional practice as primary learning mechanisms. The options for 'doing' as opposed to listening are plentiful, with examples discussed below. Which ones are best is obviously dependent on circumstances; instructors should experiment and evaluate them. This book provides material for any of the following:

- ◆ case studies (readings plus discussion or debate)
- ◆ scenarios (analysis and choice; problem solving)
- ◆ class presentations (based on assignments or projects)
- ◆ the practicum (plan and implement an evaluation, with or without external help)
- ◆ real-world assignments (job monitoring; research project; develop a case study or history; interviewing professionals)
- ◆ field trips (to event venues; to event productions)
- ◆ workshops (intensive, hands-on learning experiences)
- ◆ exercises for classroom discussion

The problem with experiential learning for evaluation and impact assessment will be to find real-world examples of high quality. Links with government agencies, consultants and event organisers will pay off in finding reports, talking to practitioners with experience, or at least identifying problems and questions that can be addressed by students.

Probably one of the best experiential learning scenarios will be to require students to plan, design and evaluate a real event. Tourism students might benefit from developing an evaluation or IA project for an existing, tourist-oriented event. When evaluation and impact assessment are built into the project from the very first concept, or goal, it becomes clear that you need a system, appropriate methods and measures, logic models and stakeholder input.

A radical pedagogical approach, perhaps more suited for executive education than the undergraduate classroom, would be to do case studies only - but where is that material to come from? I can suggest a related approach, and that is to concentrate on doing the exercises recommended throughout the book, then discussing the theory and methods that are linked to the problems. Readings would follow, not precede the exercises.

## Key Objectives of the Book

- ◆ Inform readers on impact assessment theory and methods for events and event tourism, including key concepts and definitions.
- ◆ Discuss challenges for IA applied to events and event tourism.
- ◆ Demonstrate how IA works within a comprehensive evaluation system integrated in event and tourism organisations.
- ◆ Develop professionalism for event and tourism evaluation and impact assessment.
- ◆ Recommend the goals, key performance indicators and methods for impact assessment in a comprehensive manner that includes economic, social, cultural, ecological and built-environment applications.
- ◆ Connect readers to the research literature and mainstream sources pertinent to IA.

## What This Book is Not

This book is not about research methods, it only introduces the methods and measures needed by evaluators; statistical analysis is completely avoided. Evaluation and IA have to be based on good research much of the time, so the evaluator's skills have to include research methods. At other times it is more about judgment and value perspectives.

## Organizing Principles

As noted in the Introduction to the Series, the books all begin with mainstream theory and methods, although there is certainly a degree of judgment involved in deciding what is most appropriate. For impact assessment there exists an international professional association and many books and articles to draw upon, but unfortunately the events and tourism literature on IA has always been heavily biased towards the economic dimension. That means we have more material, as reflected in the much longer chapter on economic impacts. Social impacts of events are increasingly important, and researchers have been advancing that domain more quickly and thoroughly than for culture, nature and the built environment.

Three chapters are devoted to generic IA theory and methods, then the subjects and objects of interest to event and tourism management are covered in separate chapters. 'Objects' refers to the five main impact categories: social, cultural, built environment, ecological and economic. 'Subjects' refers to the eight categories of "who or what" is impacted", actually being a spectrum starting with individuals and families and ending with entire societies or nations - as discussed in Chapter 1.

## The Figures

All the Powerpoint slides from the book that are line drawings are included in these notes, as they are originals by the author (some are adapted, as noted by 'Source') but not the Figures that are text lists only - for some of them I included a portion as an adjunct to the discussion herein. Some extra illustrations are provided from my other books or lectures. Graphics and photos are not to be circulated beyond the classroom, especially the additional ones I downloaded to augment these notes.

## Research Notes

The main purpose of adding Research Notes is to encourage outside readings, and to make students aware of the research literature. They introduce theories, methodologies and methods. They are all abstracts, or portions of, and so they can be published. Some of them can be used (that is, the actual source papers) as case studies. Students developing research proposals should use these Research Notes as starting points, particularly when looking for references. They are not discussed in this manual.

## Learning Objectives

These questions essentially preview the topics for each chapter, and as the course progresses, students will be able to provide more thorough and detailed answers to questions.

Students will get an introduction to numerous topics in the book, but they cannot expect that one book or course of study will fully equip them for professional practice. Students should be advised that learning objectives are also life-long, that they will always be trying to improve their knowledge and skills.

## Assessments

At the end of each chapter in these notes (with two lectures per chapter) I provide one or more suggested test questions (Q) for each learning objective, along with an indication of what a good answer should include (A). Suggested essay-style or long-answer questions are provided at the end of each chapter in the book, and for these I provide more detailed advice on good answers.

Ideally questions for mid-terms and finals will force students to integrate material from multiple chapters or the whole book.

## Recommended additional readings and sources

The recommended books provide background or elaboration to book contents. Be aware that web addresses do change, and the ones in the book were current in 2018 when the book was finished. Some really useful evaluation and impact-assessment sites for students and instructors are indicated, to get additional advice.

## The Index

An index for a textbook is an important resource for instructors and readers. It is very time-consuming to construct one, and requires judgement as to what is really important and some educated guesses about how users will do searches and find what they are looking for. I used several criteria in making this one:

- ◆ All headings are covered, so you can find the exact pages where they are located; obviously the table of contents does the same thing
- ◆ Main themes running through the book are covered, but I direct readers to the sections where the most useful content is located
- ◆ Cross referencing is used (see also), and re-direction (see: ) where one word is preferred

- ◆ In only a few cases have I included all page numbers where indexed words are found; mostly I included only pages where I think useful or new information is provided
- ◆ Detailed sub-categories are provided for the five main “objects” (e.g. economic is subdivided, including “legacy”, but legacy is also listed under L.

## Lecture Outlines

For simplicity I assume two lectures per chapter (that is 24 lectures, which seems reasonable for a 12 or 13-week term). Instructors will likely need flexibility in fitting all the material into the lecture times they have available - some lectures can be combined. They will also want guests and films, group discussions and presentations, and all those things that eat up class time.

The following table lists each chapter, divided into two lectures. Some lecture divisions seem logical in terms of the subject matter, but often the dividing line is arbitrary.

## Suggested Lecture Sequence

Two lectures are suggested for each chapter, except the final one, making 17 in total. Dividing lines are somewhat arbitrary and instructors can decide how to sequence the lectures.

Lecture Sequence	Lecture Topics
<b>Chapter 1:</b> <b>Basic Concepts And Definitions</b>  <b>Lecture 1:</b>	1.1 Introduction 1.2 Categories and Examples of Evaluation and Impact Assessment 1.2.1 The Matter of Scale or Scope 1.2.2 IA for Mega Events 1.3 Evaluation, Impacts and Impact Assessment Defined 1.3.1 Impact Variables 1.3.2 Impact Assessment (IA) Defined 1.3.3 Mitigation
<b>Lecture 2:</b>	1.4 The Objects and Subjects of Impact Assessment 1.4.1 Impacts on Residents (Individuals, Families, Groups and Sub-Cultures) 1.4.2 Impacts on Events and Event Organisations 1.4.3 Impacts on Businesses and Tourism Destinations 1.4.5 Impacts on Communities, Cities, Political and Government 1.4.6 Assessing Impacts of Multiple Events and Managed Portfolios 1.4.7 IA and Value Perspectives

<p><b>Chapter 2: Theory</b></p> <p><b>Lecture 3:</b></p>	<p>2.1 Introduction</p> <p>2.2 Outcomes Theory</p> <p>2.3 Logic and Theory of Change Models</p> <p>    2.3.1 Designing the TOC Model and Related IA Process</p> <p>    2.3.2 TOC Illustrated</p> <p>    2.3.3 Social Marketing</p> <p>2.4 The Meaning and Nature of Evidence</p> <p>    2.4.1 Explicit, Implicit and Tacit Knowledge</p> <p>    2.4.2 Reliability and Validity</p>
<p><b>Lecture 4:</b></p>	<p>2.5 The Forces-Pressure-State-Impact-Response Model (FPSIR)</p> <p>2.6 Cumulative Impacts</p> <p>2.7 Limits of Acceptable Change (LAC) and Related Concepts</p> <p>    2.7.1 Thresholds</p> <p>    2.7.2 Standards</p> <p>    2.7.3 Capacity</p> <p>    2.7.4 Precautionary Principle</p> <p>2.8 Summary of Theories, Concepts and Models In This Book</p>
<p><b>Chapter 3:</b></p> <p><b>Ia Process, Measures And Methods</b></p> <p><b>Lecture 5:</b></p>	<p>3.1 Introduction</p> <p>3.2 The IA Planning Process: Four Models</p> <p>    3.2.1 Steps in the IA Process (Forecasting Impacts)</p> <p>    3.2.1 Strategic Impact Assessment</p> <p>    3.2.1 Retrospective IA Planning Process</p> <p>    3.2.4 Post-Event IA</p> <p>    3.2.5 Edinburgh Festival Impact Studies</p> <p>3.3 Measurement Issues and Metrics</p> <p>    3.3.1 Indicators</p> <p>    3.3.2 Variables for Metrics</p>
<p><b>Lecture 6:</b></p>	<p>3.4 IA Methods</p> <p>    3.4.1 Matrices (Leopold Matrix)</p> <p>    3.4.2 Network Diagrams</p> <p>    3.4.3 Rapid Impact Assessment</p> <p>    3.4.4 Field and Quasi Experiments</p> <p>    3.4.5 Case Studies, Comparisons &amp; Benchmarking</p> <p>    3.4.6 Trend Analysis</p> <p>    3.4.7 Scenarios</p> <p>    3.4.8 Mapping</p> <p>    3.4.9 Decision Trees</p> <p>    3.4.10 Simulation Models</p> <p>    3.4.11 Calculators (Carbon, Ecological Footprint, Direct Economic Contribution)</p> <p>    3.4.12 Visualizations</p> <p>3.5 Forecasting</p>

<p><b>Chapter 4: Social Impacts</b></p> <p><b>Lecture 7:</b></p>	<p>4.1 Introduction</p> <p>4.2 Social Impacts</p> <p>    4.2.1 Definitions</p> <p>    4.2.2 Mega-Event Social Impacts</p> <p>4.3 The Objects and Subjects of SIA For Events and Tourism</p> <p>    4.3.1 Personal and Family Impacts</p> <p>    4.3.2 Social Impacts on Groups and Sub-Cultures</p> <p>    4.3.3 Social Impacts on Events and Event Organisations</p> <p>    4.2.4 Social Impacts on Communities and Cities</p> <p>    4.2.5 Social Impacts on Businesses</p> <p>    4.2.6 Social Impacts on Tourist Destinations</p> <p>    4.2.7 Social Impacts on Politics and Government</p> <p>    4.2.8 Social Impacts on Society as a Whole; the Nation</p>
<p><b>Lecture 8:</b></p>	<p>4.4 The Process of Social Impact Assessment</p> <p>    4.4.1 Generic SIA Process</p> <p>4.5 Methods</p> <p>    4.5.1 Resident Surveys</p> <p>    4.5.2 Use and Non-Use Values</p> <p>    4.5.3 Additional Questions for Residents and Stakeholders About Impacts</p> <p>    4.5.4 Ethnographic Methods</p> <p>    4.5.6 Case Studies</p> <p>4.6 Measuring Social Capital</p>
<p><b>Chapter 5: Cultural Impacts</b></p> <p><b>Lecture 9:</b></p>	<p>5.1 Introduction</p> <p>5.2 Definition, and Elements of Culture</p> <p>    5.2.1 Events, Tourism and Cultural Impacts</p> <p>    5.2.2 Mega-Event Cultural Impacts</p> <p>5.3 The Subjects and Objects of Cultural IA For Events and Tourism</p> <p>    5.3.1 Individuals and Families</p> <p>    5.3.2 Groups and Sub-Cultures</p> <p>    5.3.3 Events and Event Organisations</p> <p>    5.3.4 Businesses</p> <p>    5.3.5 Communities and Cities</p> <p>    5.3.6 Tourist Destinations</p> <p>    5.3.7 Politics and Government</p> <p>    5.3.8 Whole Cultures or The Nation</p>
<p><b>Lecture 10:</b></p>	<p>5.4 Cultural Impact Assessment: The Process</p> <p>    5.4.1 Scoping and Consultations</p> <p>5.5 Methods</p> <p>    5.5.1 Mapping</p> <p>    5.5.2 Mind Mapping</p> <p>    5.5.3 Limits of Acceptable Change</p> <p>    5.5.4 Assessing Cultural Capital</p> <p>    5.5.5 Theory of Change: The Personal Impacts of Cultural Engagement</p>

<p><b>Chapter 6:</b> <b>Built-Environment Impacts</b></p> <p><b>Lecture 11:</b></p>	<p>6.1 Introduction</p> <p>6.2 Events, tourism and urban development or renewal 6.2.1 Mega-Event Impacts on the Built Environment</p> <p>6.3 Events And The Use Of Public Spaces 6.3.1 Life-Cycle Considerations</p> <p>6.4 Subjects And Objects 6.4.1 Individuals and Families (Residents) 6.4.2 Groups and Sub-Cultures 6.4.3: Events And Event Organisations 6.4.4 Businesses 6.4.5 Communities and Cities 6.4.6 Tourist Destinations 6.4.7 Politics and Government 6.4.8 The Nation</p>
<p><b>Lecture 12:</b></p>	<p>6.5 Place Making and Place Marketing 6.5.1 Longitudinal Research on Image Change 6.5.2 Media Management and Impact Assessment 6.5.3 Methods for Assessing Media Impacts</p> <p>6.6 Case Study by Rudi Hartmann: Explaining Growth Dynamics of Resort Areas: Human Agency, Pro-Active and Reactive Responses to Trends in Ski Resort Development in Vail, Colorado</p>

<p><b>CHAPTER 7:</b> <b>Ecological Impacts</b></p> <p><b>Lecture 13:</b></p>	<p>7.1 Introduction</p> <p>7.2 Nature and Ecology 7.2.1 Sustainability and the Greening of Events</p> <p>7.3 Environmental Impacts of and on Events 7.3.1 Mega-Event Ecological Impacts</p> <p>7.4 Subjects And Objects Of Ecological Impact Assessment 7.4.1 Ecological Impacts on Individuals and Families (Residents) 7.4.2 Groups and Sub Cultures 7.4.3 Events and Event Organisations 7.4.4 Businesses 7.4.5 Communities and Cities 7.4.6 Tourist Destinations 7.4.7 Politics and Government 7.4.8 Society as a Whole; The Nation</p>
<p><b>Lecture 14:</b></p>	<p>7.5 The Process of Ecological Impact Assessment 7.5.1 Steps in EIA</p> <p>7.6 EIA Methods 7.6.1 Forces-Pressure-State-Impact-Response Model 7.6.2 Carbon Calculators 7.6.3 Ecological Footprint Analysis</p>

<p><b>CHAPTER 8: Economic Impacts</b></p> <p><b>Lecture 15:</b></p>	<p>8.1 Introduction</p> <p>8.1.1 Basic Principles of Economic IA</p> <p>8.2 Potential Economic Impacts of Events And Tourism</p> <p>8.2.1 Costs and Negative Impacts</p> <p>8.2.2 Return On Investment (ROI) and the Economic Worth of Events</p> <p>8.2.3 Economic Impacts on Individuals and Families (Residents)</p> <p>8.2.4 Social and Cultural Groups</p> <p>8.2.5 Events and Event Organisers</p> <p>8.2.6 Community and City</p> <p>8.2.7 Businesses</p> <p>8.2.8 Tourism Destinations</p> <p>8.2.9 Politics and Government</p> <p>8.2.10: Society as a Whole; The Nation</p>
<p><b>Lecture 16:</b></p>	<p>8.3 Creating Economic Value With Events And Tourism</p> <p>8.3.1 Maximising Local Benefits</p> <p>8.4 Special Considerations for Types of Events</p> <p>8.4.1 Sport</p> <p>8.4.2 Festivals and Other Cultural Celebrations</p> <p>8.4.3 Entertainment and Music Events</p> <p>8.4.4 Business Events</p> <p>8.4.5 Mega-Event Impacts</p> <p>8.4.6 Hallmark and Iconic Event Impacts</p> <p>8.5 Methods</p> <p>8.5.1 The Process of Economic Impact Assessment</p> <p>8.5.2 Estimating the Direct Economic Contribution (DEC)</p>
<p><b>CHAPTER 9: Conclusions</b></p>	<p><b>Lecture 17:</b></p> <p>9.1 Cost-Benefit Analysis (CBA)</p> <p>9.2 Benefits and Costs Evaluation (BACE Model)</p> <p>9.2.1 Equity Issues, and Zero-Sum Situations</p>