

MODELLING CULTURAL SPECIAL EVENTS

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Abstract

This paper describes the development of a best practice annual managerial model for cultural special events. A unified model of special event management, comprising four stages: decision; planning; implementation; evaluation, was synthesised from an extensive review of the literature. The model was used as a projective instrument in depth interviews with cultural special event managers in a multiple case study of three Welsh cultural special events (Llangollen International Music Festival, Urdd Eisteddfod and the May Fair at the Museum of Welsh Life). From the interviews three reasonably similar individual annual managerial models of each event were developed. These were then unified in a single best practice model, through the use of a modified Delphi technique. The initial decision phase for the first year of each event differed markedly between events however, the event managers were able to achieve consensus on a best practice annual managerial model for cultural special events.

Keywords: Event tourism, cultural special events, Wales, event management models, project instrument.

Introduction

The phenomenal growth of interest in special events as evidenced through the plethora of annual special events calendars produced by many tourist authorities and associated specialist texts, journals, conferences and research studies has been commented on by many authors (e.g. Hall 1992; Getz 1997; Jago and Shaw 1998; McDonnell *et al.* 1999). Growth has been ascribed to the flexibility of special events as a tool for achieving a wide range of economic, political, cultural and social aims. In economic terms, special events can be employed for promoting tourist products, destinations or even entire countries; encouraging long-term investment; creating new permanent and/or temporary jobs; generating direct economic benefits for host communities through increasing visits; improving levels of visitor expenditure or minimising “*leakage of resident money from the economy*” (Long & Perdue 1990: 10). Events can be used at ‘*both the macro- and micro-political level*’ (Hall 1992: 88) to create or enhance international images of a county or regime or as ‘*policy tools*’ (Getz 1997: 34) to promote cultural development, reduce social tensions or preserve traditions. At a cultural and social level, special events can be used for encouraging local participation, increasing awareness of a venue, occasion, tradition or socio-cultural value; increasing ‘civic’ pride; heightening an area’s profile; satisfying the needs of special interest groups; conserving local traditions; galvanizing particular segments of society; strengthening volunteerism, cooperation and intercultural interaction. Special events are an undeniably important element in promoting destination visitation and a key to the marketing of destinations or even entire countries.

However, a survey of the literature on event management revealed that whilst particular aspects of events, e.g. use of volunteers, marketing and economic impact, have been explored in great depth there was no holistic model of event management to provide an overview of event management practice. Event management is extremely pragmatic and initial conversations with experienced event managers showed that they do not use an explicit model to guide actions.

The aim of this paper was to develop a projective instrument to facilitate the articulation and holistic evaluation of individual approaches to cultural special event management in depth interviews with the managers of three Welsh cultural special events (Llangollen International Music Festival, the May Fair Festival at the Museum of Welsh Life and the Urdd Eisteddfod). Projective instruments are widely used in clinical and forensic settings (Lilienfeld *et al.* 2000) and increasingly in consumer research and marketing (Chang 2001). Lilienfeld *et al.* (2000) identify five major subtypes of projective technique: association; construction; completion; arrangement/selection; expression.

The projective instrument developed here would best be categorised alongside construction techniques which are '*especially useful when a holistic research approach is desired*' (Hassay and Smith 1996). The projective instrument (see figure 1) was developed from a review of the literature and borrows from Program Evaluation and Review Technique (PERT) (Malcolm *et al.* 1959) in identifying and ordering constituent activities. The model provides a framework for the systematic identification and deconstruction of four major stages of event development, namely: decision, detailed planning, implementation and evaluation.

Interviewees were invited to comment on the unified model and asked to tell the story of their event detailing when and how their event differed from the model. In this way qualitative data was collected which enabled the development of a rich picture of each event. Following the depth interviews revised models of the individual events were developed (see Figures 2, 3 and 4). In discussing each of the individual models with the three event managers and through reflecting on the congruence and dissonance between the individual event models using a modified Delphi technique, an annual managerial model of cultural special event management was developed (see Figure 5).

A Unified Model of Cultural Special Events Management

The Salem *et al.* (2004) model of event management provides an overview of event management practice applicable to festivals and cultural events and can be used as a projective instrument to facilitate discussion with event managers. In practice the model is not necessarily linear and may be iterative, e.g. redefining the event product in the light of a detailed financial study or market research. Activities do not take place in series but are broken down to facilitate their parallel development and the involvement of different stakeholder groups, whether employed directly by the event or sub-contracted. The four phases of the model are described briefly below.

INSERT FIGURE 1 HERE

The decision phase

The decision phase initiates the process and determines ultimately whether the event goes ahead or not. At its most complex, it comprises five distinct activities: catalysis; specifying the event aims and objectives; establishing the management board; outline feasibility study including market research and an initial financial study; decision-making.

- Catalysis relates to the source of the event concept and may result from the public (government, local authority or agency), private (corporation, firm or individual) or voluntary sector. The concept may be more or less developed depending on its source.
- Event aims and objectives are crucial and must be resolved early as they impact on many aspects of the event and may fall into one of three main categories: economic, social and cultural, political. Event aims are ideally broken down into 'SMART' objectives (Doran 1981) to help identify performance targets for the event and facilitate event evaluation.
- A management board progresses the event and comprises one or more people who plan, implement and evaluate the event. It reflects diverse skills and expertise and typically comprises: an event manager, a financial advisor, a marketing advisor and a legal advisor.
- An outline feasibility study focusing on market research and an initial financial study checks that the event 'stacks up' and provides a broad indication of success or failure. For larger events with more risk associated with event failure more detailed research may be required.
- Decision-making completes the decision phase and enables the board to decide whether the event should progress to the detailed planning stage.

The detailed planning phase

Detailed planning involves event product definition and detailed financial study, which often form an iterative cycle. Detailed planning then moves onto development of strategies relating to logistics, marketing and human resource management.

Event product definition and financial study - event design should aim to create a mix that satisfies the largest number of potential customers and avoids product orientation, i.e. trying to sell the event *'with little or no regard for what potential customers need, want, and will pay for'* (Getz 1997: 251). The earlier the features are specified the better, although *'events are organic and will evolve all the way through the event itself'* (Armstrong 2001: 49). For a mega event product definition may take place over a period of several years leading up to the event. The detailed financial study usually focuses on defining and estimating three issues: anticipated income and expenditure, budgeting and cash flow.

Event marketing - has three important objectives - *'read their [customer] needs and motivations, develop products that meet these needs, and build a communication programme which expresses the event's purpose and objectives'* (Hall 1992: 136). Market research, although not always utilised, can help understand customer motivations. *'You may have the best quality event product, but unless you have a strategic plan for promoting this product it will remain the best-kept secret in the world'* (Goldblatt 1997: 230). Promotional techniques include advertising, publicity (*'securing...free space in printed media or free time in broadcast media'* (Davidoff and Davidoff 1994: 197)), public relations and merchandising. The timing of marketing activities is critical to event success.

Logistics - allows the event organizers to plan how the event will fit into the venue and how facilities, staff, equipment services, etc, will be distributed and scheduled. Important considerations include: signage, crowd management and crowd control.

Human resource management - is a key element of the event experience. The human resource strategy flows from analysis of which elements are to be delivered by the event organizers and which are to be sub-contracted to other organizations. The resultant staffing structure is likely to involve several different categories of staff - a professional core of staff supplemented by specialist consultants, hourly-paid staff and volunteers.

Implementation Phase

Implementation comprises monitoring event progress, dealing with contingencies and shutting down activities.

Monitoring event progress - detailed planning provides a confirmed management plan identifying key activities for monitoring the event and enabling, where necessary, corrective action.

Dealing with contingencies - whilst unexpected happenings are generally out of the control of the event organizers event organizers need to ask *'What if...?'* and rehearse solutions. There are *'two good defences against most problems: well-prepared leadership and a strong set of contingency plans'*, although they *'cannot possibly cover every conceivable occurrence'* (Armstrong 2001: 152). Well-trained staff members able to deal with most expected contingencies are vital, although staff must also know what to do in the case of emergencies. Good communication is key to success.

Shutting down activities - includes two tasks: dismantling and selling or removing the equipment and cleaning up. A timetable for suppliers to dismantle and remove hired equipment should be identified in the hire contract. Cleaning up should extend beyond the event to include the removal, and ideally recycling, of promotional materials and special signage.

Evaluation Phase

Evaluation *"is the process of looking back at an event, identifying good and bad points, and learning for the future"* (Youell 1994: 103). It can be divided into outcome and process evaluation. Outcomes should be derived from the original SMART objectives set for the event in the decision phase. Data for outcome evaluation, e.g. final profit and numbers of tickets sold, emerge after the event. Process evaluation requires feedback from event staff and customers, although timing is critical as dispersal happens quickly after the event. Staff debriefing sessions, e.g. using focus groups with visual evidence such as video footage and media coverage as tools, allow staff to reflect on the event. Customer feedback can be obtained in various ways.

Methodology

Four inclusion criteria were used to select three Welsh events. Firstly that the event was a cultural special event: i.e. it focused on cultural activities. Secondly, it received a government subsidy. Thirdly, its primary aims were non-financial (i.e. it had social or cultural aims) with financial aims as secondary aims, or not considered at all. Fourthly, that the event was a recurring special event (i.e. not a one-off event).

According to these criteria three Welsh events were selected - LIME, MF and UE. The research was conducted in two phases. Phase 1 analysed the management of the three events to enable identification of congruence and dissonance in managerial approaches to event management and involved depth interviews with senior staff in the organising boards of each of the three cases. The Salem *et al.* model (see Figure 1) was used as a projective instrument to structure the interviews.

Phase 2 focused on achieving consensus on a generic model for cultural special events management and involved the use of the Delphi Technique. Delphi Technique is a well-established means of developing consensus (Green *et al.* 1990, Veal 1997, Bramwell and Hykawy 1999). The models developed in Phase 1 from each of the three events were discussed with each of the three event organisers and differences between the models discussed and a 'best practice' generic model developed.

Results

Case one: Llangollen International Musical Eisteddfod (LIME)

LIME goes through four managerial phases: decision, planning, implementation and evaluation (see Figure 2). The first year decision phase differed from the decision phase for subsequent iterations of the event. LIME was firstly organized in 1947, on the inspiration of Harold Tudor who provided the idea for organizing an international Eisteddfod for cultural activities including musical, literature and artistic activities and aiming to make a contribution through the arts into better understanding and friendship between nations. Later another 'pragmatic aim' was added, i.e. to achieve financial break-even on an annual basis. Llangollen was suggested as a home for the Eisteddfod and the catalyst proposed the event concept to the town council and residents who announced their willing for nominating Llangollen as a permanent location for the Eisteddfod. This led to the formation of a voluntary Board of nine local members to manage the event. The potential budget was initially estimated and four local businessmen agreed to act as guarantors for the event (Attenburrow 1996). Subsequently, a decision was made by the Board to move to detailed planning.

In subsequent iterations of LIME the catalyst's role has vanished and control has passed to a permanent organizing board. The decision phase is now confined to revising the objectives, forming the initial features, and estimating the cost of new activities. Similar to the unified model, LIME organizers agree with splitting the detailed planning phase into five areas: event definition, financial study, human resource management, marketing and logistics. But, unlike the unified model, the five activities take place in parallel. During Eisteddfod week, all three theoretical implementation activities are undertaken. A ground committee is mainly responsible for monitoring the Eisteddfod implementation and taking corrective actions against any deviations. A risk management scheme analyses the potential hazards against individuals (e.g. accidents, stampedes) and property (e.g. fire, thefts). Post-event a week is dedicated for shutting down activities. Evaluation is always made toward the end of, or shortly after, the event implementation targeting the assessment of the fulfilment of the SMART objectives, defining the problems and identifying improvements for the following Eisteddfod. Evaluation tools include attendants' comments, staff self-assessment, official records as well as market research.

INSERT FIGURE 2 HERE

Case two: May Fair Festival (MF)

MF is a recurring three-day cultural event held at the Museum of Welsh Life in Cardiff. MF dates back to the 16th century and signifies the celebration of the traditional Spring season. MF involves traditional activities, such as

raising the Maypole and folk dancing. Despite its long history, celebrating MF at the Museum only started in 1987. Similar to both the unified model and LIME model, the management of MF goes through four phases: decision, planning, implementation and evaluation, which form the managerial frame for organizing the festival (see Figure 3).

Revival of celebrations of the traditional May Fair was suggested by the Museum of Welsh Life, Marketing Department in 1987. The aim was to increase public awareness of Welsh culture. A board comprising senior members from the museum staff was formed to run the event. The Board then formed the festival initial features, which were approved by museum visitors through market research. Being part of the Museum of Welsh Life, the site activities department, received a fixed budget for the activities each April. However, this does not preclude a separate initial financial study for each year's event before decision-making. Initial estimation for the event costs are assessed and proposed to the events committee, which bases its decision fundamentally on the event costs. Similar to LIME, the first-year decision phase was not repeated. Again the role of the catalyst ended after suggesting the idea, and the festival control passed entirely to the organizing committee. The festival idea and aim did not need any further decisions; as well, no pre-event market research was conducted. Therefore, the decision phase is now confined to revising the objectives, forming the festival initial features, undertaking the festival initial financial study before decision-making.

Similar to the unified model, all the detailed planning phase areas were identified for the MF. However, unlike the unified model and due to constraints of the advanced fixing of the budget, the financial study is brought forward and has a major influence on the planning of each of the other four areas, which occur in parallel. All the three theoretical implementation areas are identifiable. Again, a risk management scheme is applied. The site was divided into four zones with a senior staff member allocated to each monitor the event and implement required remedial action. Typically, shutting down activities take place after the festival. Evaluation starts immediately after the event implementation. Unlike the unified model, but similar to LIME, market research is conducted during and after the event for evaluation purposes. Other evaluation tools, including staff self-assessment, public and stockholders comments, are also utilized. Although evaluation covers all six areas mentioned in the unified model, MF organizers deem that the evaluation conducted is insufficient due to shortage in time.

INSERT FIGURE 3 HERE

Case three: Urdd Eisteddfod (UE)

As with the unified model and the previous two cases, the management of UE goes through the four managerial phases: decision, planning, implementation and evaluation (see Figure 4). UE was firstly organized in 1929, on the inspiration of Sir Ifan ab Owen Edwards who proposed an idea for organizing a national Eisteddfod where children compete in Welsh cultural activities, including music and drama performances. The aim was to encourage Welsh children and teenagers to preserve their Welsh culture, especially the Welsh language, and to give them the opportunity to develop their artistic skills. Sir Ifan invited Urdd members in Corwen to a meeting to arrange UE in their town. The meeting led to the establishment of an organizing committee to manage UE. Subsequently, the organizing committee decided that UE would be a two-day event with drama competitions. Few trophies were to be awarded with no monetary prizes (Davies 1973). No market research or initial financial study was conducted before the first event decision-making.

INSERT FIGURE 4 HERE

Similar to the previous two cases, the first year decision phase was not repeated in subsequent iterations and also the catalyst role disappeared. The event idea and aim required no more discussions; nevertheless, the board revises UE's objectives each year. Additionally, features of UE are altered in the light of initial estimates of the

financial situation, before decision-making. Similar to both the unified model and the previous two cases, the detailed planning phase of UE comprises five activities. Nevertheless, similar to the MF case, UE organizers deem that the financial study precedes and impacts on all four other activities. During the six days of the UE, a site manager who supervises a trained team responsible for managing potential risks manages all three theoretical implementation activities. All staff members are required to report any risk or implementation problems immediately to the site manager. Finally, dismantling the equipment and cleaning the site is usually conducted immediately post-event. Similar to the previous two cases, evaluating UE commences as the implementation phase is being completed. Several evaluation tools including market research, stockholders' surveys (i.e. sponsors, merchandisers), reports from staff and Board members and official records, are used aiming to improve the following Eisteddfod.

Discussion

Congruence and Dissonance between the three models

Like the unified model, each of the annual managerial models for the three cases splits into four phases: the decision, the detailed planning, the implementation and the evaluation phase, to form the managerial framework for organizing the events (see Figures 2, 3 and 4). While the unified model claims that the decision phase would be repeated through subsequent event iterations, the Welsh cases reveal that two distinct decision phases are undertaken - first, a non-recurring decision phase for the first event only; second, a recurring decision phase for all subsequent events. The decision phase in the unified model seems more analogous to the non-recurring decision phase.

Similar to the unified model, all the three non-recurring decision phases began on the inspiration of a catalyst that provided the event idea and aims; and ended by a decision-making. In between, two areas have been repeated in all the three cases, regardless the sequence in which they emerged, which are: forming the Board and forming the initial features. Nevertheless both market research and initial financial study (i.e. feasibility study) were conducted in the LIME and MF cases; UE is the only case where neither market research nor initial financial study was done.

In all the three cases, the recurring decision phase typically starts by forming the organizing Board, which then revises the event objectives aiming to provide precise criterion for what is actually expected from the event to achieve. Afterwards, whereas LIME Board firstly forms the initial features, before undertaking an initial financial study in case of new activities only, prior to decision-making, both the MF and the UE Boards start by undertaking the festival initial financial study first, which leads to forming the event initial features, before decision-making.

Despite all the three cases illustrate resemblance with each other and with the unified model concerning applying all the planning five areas, evident distinction emerges concerning: the sequence of those five areas and therefore the interior influence between them. Whereas, LIME organizers assert that all the five planning activities take place at the same time where mutual influence emerges between them; both MF and UE organizers state that the financial study usually takes place prior to all the other four activities, which are all influenced by the financial study outcome. However, this could be due to the fact that, while LIME depends largely on self-funding, which gives the organizers the freedom to alter their budget regarding the other planning activities, the other two events depend mainly on restricted funding from external entities, which necessitate considering the financial availabilities before launching any other planning activity.

All the three Welsh cases are similar to the unified model in relation to the implementation phase, where three activities emerge: on ground risk management, monitoring implementation and shutting down activities.

Unlike the unified model all the three Welsh cases, locate the market research at the end of the implementation phase, aiming to provide feedback for evaluation and to assess whether the event fulfilled its objectives or not. Several tools including public comments, staff self-assessment, official records besides market research are utilized.

Building a consensus on a best practice model

In discussion each of the three models resulting from Phase 1 of the study were discussed with senior members in the organizing boards for each of the three events. The interviewees were invited to revise the models to ensure they reflected practice. They were then invited to give an opinion on what they think would be the most appropriate for a generic best practice model. Building a consensus required only one iteration of the Delphi technique, as the differences between the three Welsh cases were minimal. Those differences confined to: firstly, the relation between conducting the initial financial study and forming the initial features (the decision phase); second, the relation between

the financial study and the rest of the planning areas (the planning phase). All the three cases were identical in relation to the implementation and evaluation phases.

INSERT FIGURE 5 HERE

Llangollen International Musical Eisteddfod

For financial reasons the LIME general secretary suggested that LIME is about to change its model to undertake initial financial studies before forming the Eisteddfod syllabus (i.e. the Eisteddfod features). The LIME model would then be following the pattern of both MF and UE. The LIME General Secretary states that the Eisteddfod syllabus for the year 2004 will be produced in January 2004 based on the results of an on-going financial study, which depends on the elements of the last available actual budgets (i.e. the budget of LIME 2003). Both these changes emphasise the increasing attention that the LIME organizers are paying now to the LIME financial situation and its influence on all the other procedures. Finally, LIME General Secretary suggested that organizing a new event would preferably start with a financial study in advance to minimise risk of major financial loss.

May Fair Festival

The MF manager believes that their managerial model offers them an efficient and successful framework for their event. As well, she believes that conducting the financial study (whether during the decision or the planning phase) before any other activity is essential for them to guarantee keeping the expenditure within the defined budget. Consequently, she declares that there is no reason to change their model.

Urdd Eisteddfod

The UE South Wales office manager believes that the UE model provides an efficient pattern for managing their Eisteddfod which had been successful over the long history of the Urdd Eisteddfod. However, conducting the financial studies in advance, whether during the decision phase or the planning phase, offers them security against financial loss and guarantees financial support at the outset before designing any features.

Finally, it should be revealed that none of the event organizers believe they can suggest any consensus on the non-recurring decision phase, assuming that it reflects the circumstances surrounding each catalyst separately and can hardly be predicted or changed.

Conclusion

The benefits of special events in the promotion of tourism products are undeniable. However, to maximise the benefits of such events there are a number of management issues that need consideration, notably the development of a model of good practice that could be incrementally enhanced in the light of experience and could codify knowledge and experience gained from the delivery of special events to inform future practice. There is considerable consensus on the annual managerial models for the Welsh cultural special events studied and a generic best practice annual managerial model was produced (see Figure 5). The implementation and evaluation phases were identical for all the events studied. For each event the detailed planning phase are similar in terms of the constituent activities but differ in the chronological order in which these activities are undertaken. This can be ascribed to the relative priority given to financial planning in each of the events. The decision phase also shows similar activities for each of the events with differences relating to the initial financial study although in subsequent iterations of LIME there will be no differences between the events. Differences between the models relate mainly to the first year decision phase for which it was not possible to develop a consensus model. This is due to historical differences in the development of each of the cultural special events as a result of the different circumstances facing each catalyst.

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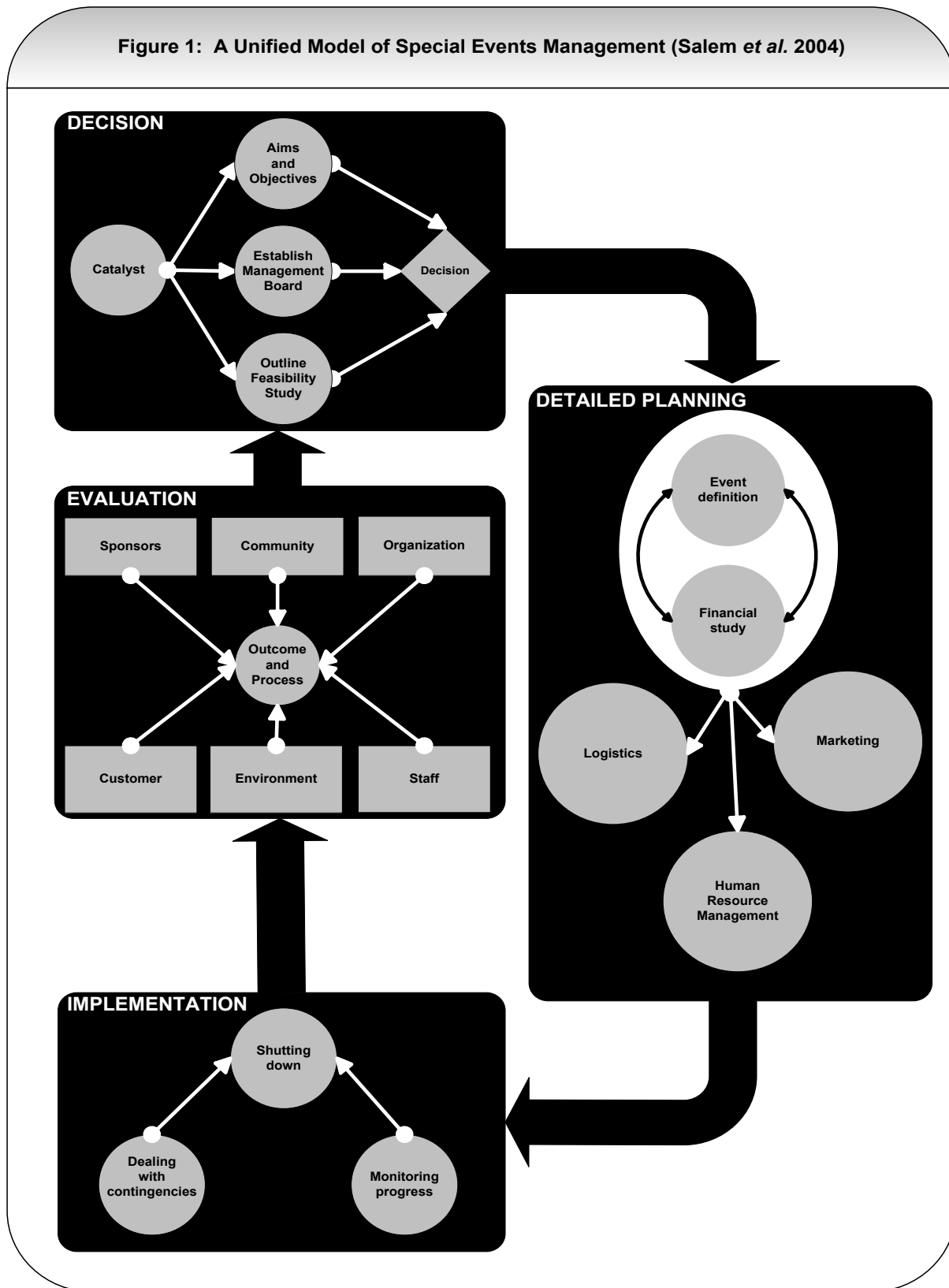


Figure 2: A Model of the Llangollen International Music Festival

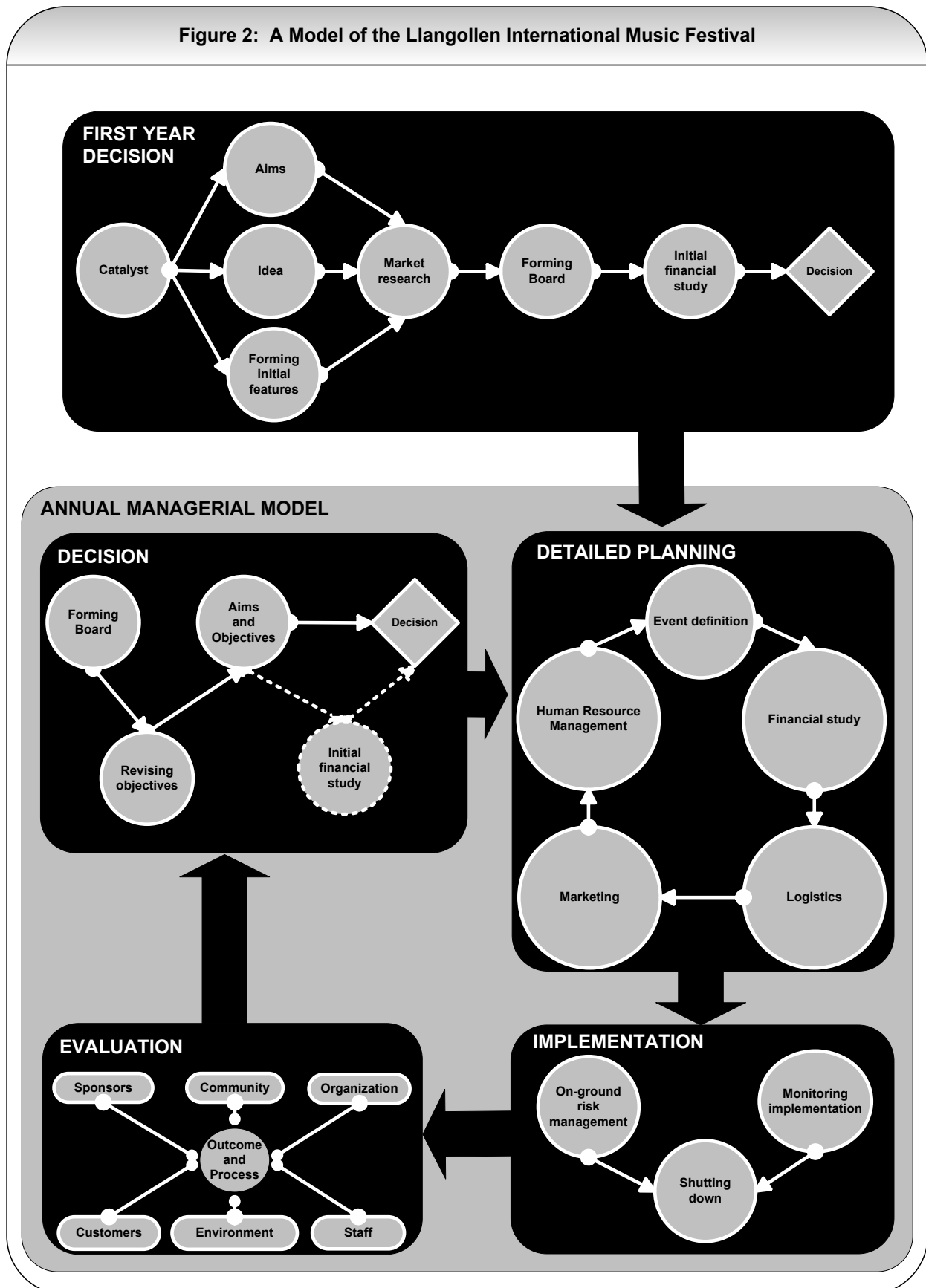


Figure 3: A Model of the May Fair Festival at the Museum of Welsh Life

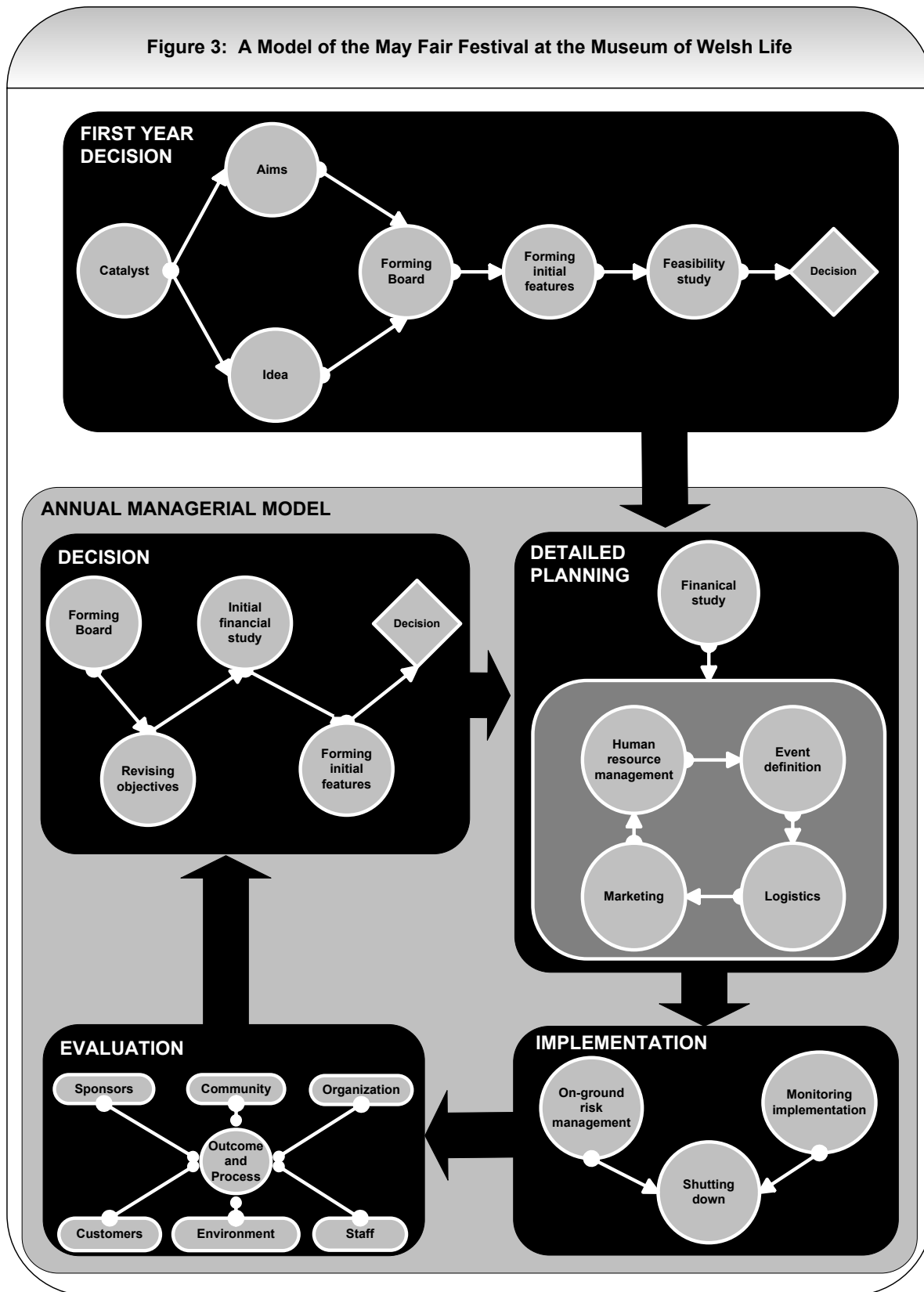


Figure 4: A Model of the Urdd Eisteddfod

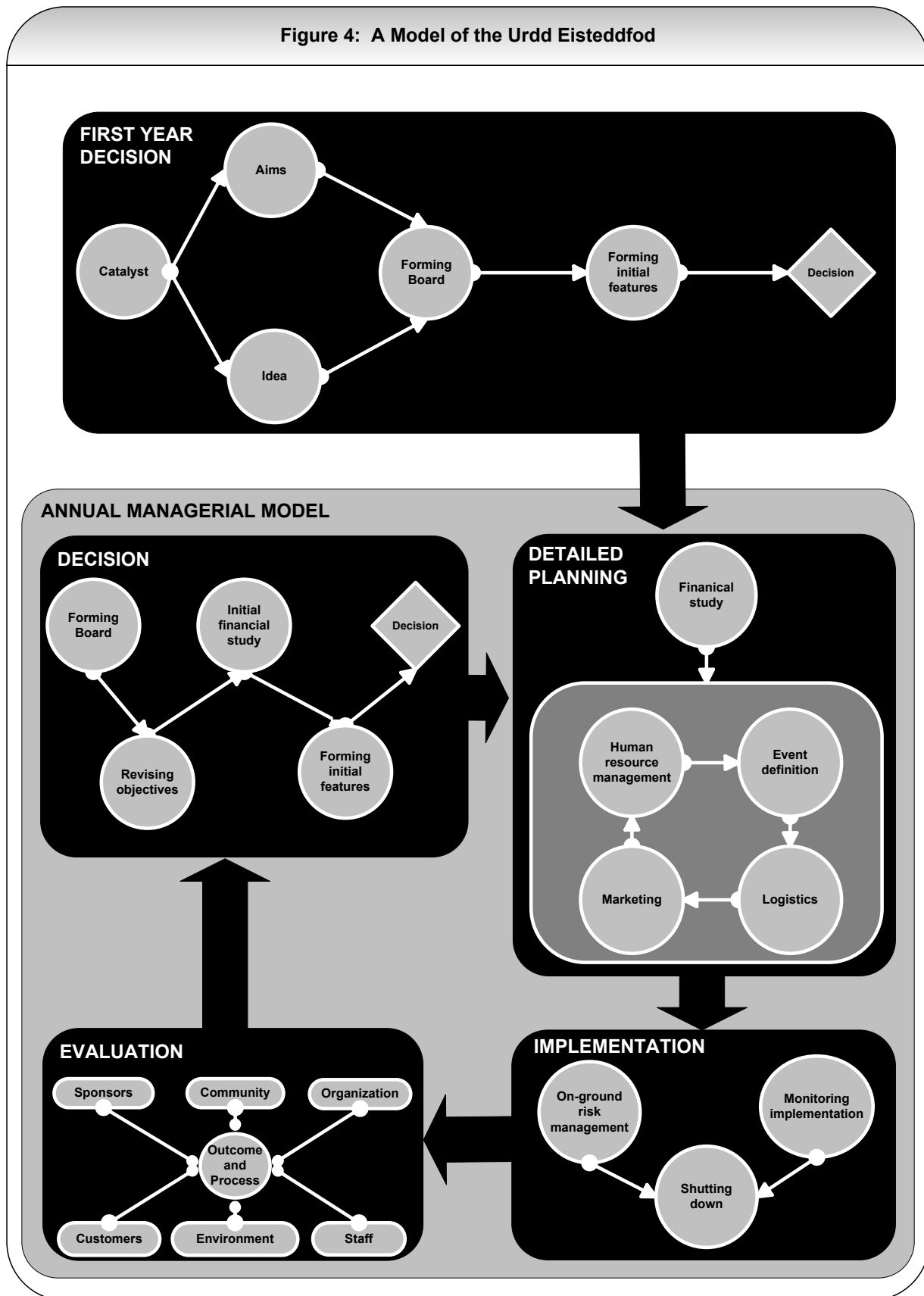


Figure 5: A Generic Best Practice Annual Managerial Model for Cultural Special Events

