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A U S T R A L I A

Essays on Event Leverage: The strategic use of event leverage in host destinations

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Abstract

Events are increasingly being integrated into a destination's product offering as a means of diversifying the product mix, providing a unique selling point, thereby gaining a competitive advantage (Jago, Chalip, Brown, Mules, & Ali, 2003; Sant, Mason, & Hinch, 2013; Westerbeek, Turner, & Ingerson, 2002). While events have been found useful in this regard to deliver destination objectives, greater focus is now being placed on how those objectives are developed (Chalip, 2014, 2018; Ziakas, 2014b). Given the significant investment that is needed to stage events, in particular, large-scale events and the increased scrutiny of the public regarding the spending of taxpayers' funds on hosting events (Groothuis & Rotthoff, 2016), it is even more critical to outline the outcomes and what strategies will be needed to deliver those outcomes. The strategic planning of event outcomes is known as event leverage (O'Brien, 2006; O'Brien & Chalip, 2007).

Event leveraging research and theory are considered to be in an embryonic stage (Chalip, 2018), and is therefore a developing concept within the event literature. Nonetheless, event leverage has been touted as a useful strategy for devising event outcomes (Hoskyn, Dickson, & Sotiriadou, 2018). However, a deeper understanding is needed to fully appreciate the complexities and utility of the concept and how its application can improve the event and tourism fields. Despite the growing body of work relating to event leverage, there are areas that are either absent from the literature or where research is still limited.

Using a qualitative approach three independent but related research studies were completed, as this allowed the researcher to examine different stakeholders to understand the impact of an event leverage strategy on those stakeholders. Therefore, the overarching purpose of this thesis is to examine the strategic use of event leverage in host destinations. For the purpose of this thesis the following three research objectives were identified, so as to further explicate the event leverage concept:

Research objective 1: To examine how formalised regulations of event rights owners impact how a host community can leverage an event.

Research objective 2: To explore the applicability of tourism leveraging strategies devised for mega-events on small-scale events.

Research objective 3: To understand how relationships can facilitate the creation and maintenance of an event portfolio.

The first study drew on organisation theory, specifically, formalisation and how the formalised regulations of global event rights owners, impact the leveraging efforts of host destinations. The study

used the context of the 2007 International Cricket Council (ICC) Cricket World Cup (CWC) that was staged in the West Indies and co-hosted by nine Caribbean islands. The study focused on two co-hosts, Barbados and Jamaica, as both countries announced their respective intent to strategically use the event to achieve development outcomes. Nineteen face-to-face interviews were conducted with key tourism stakeholders and former members of the local organising committees for Barbados and Jamaica. The findings revealed that the ICC's highly formalised host agreements negatively impacted the host destinations' respective abilities to leverage the event. The contracts prescribed the use of preferential global partners to undertake certain event operations and services, while simultaneously proscribing the display and infusion of local culture into the event. The cumulative effects of these formalised regulations were: reduced opportunities for local suppliers (both to benefit financially and also to gain event experience from hosting large-scale events); limited display of local culture; and economic leakage from the local economy. Notwithstanding, host destinations with the capacity and confidence to push back, were able to circumvent restrictions. As a result, additional benefits were realised by these host destinations.

The second study draws on contingency theory to investigate whether tourism leveraging strategies designed for mega-events are applicable to small-scale events. In-depth interviews conducted with eight event managers of small-scale events revealed that the managers perceived grant funding offered to promote tourism leveraging to be a diversion from the core purpose of staging the event. Restrictions on grant funding directed the event managers' focus to increasing the number of tourists and their length of stay and their spending in the destination. While event managers acknowledged that engaging in tourism leveraging expanded the event's target markets and increased the size of the event, they believed that tourism operators were the key beneficiaries of the leveraging. Mutual benefits between event and tourism organisations occurred when the funding partner(s) and the event collaborated. The findings are consistent with the tenets of contingency theory, which suggest that managerial solutions are not automatically scalable.

The third study examined the utility of relationships in the creation and maintenance of an event portfolio. Nine semi-structured interviews were conducted with tourism and government stakeholders involved in the creation and maintenance of an event portfolio within a single destination. The destination outlined clear strategic goals through an event strategy. The establishment of an Events Board was instrumental in bringing together key stakeholders from tourism, events, and government to oversee the development of an event portfolio. Although forging relationships was not a stated objective, it was critical to cementing the destination's event portfolio. Long-term funding contracts were used as a mechanism to establish relationships and were an impetus for interaction.

Relationships were also maintained through dedicated staff who managed the relationships between the destination stakeholders and the events.

The results of the studies should support event policymakers, destination marketers and event managers when formulating strategies and policies to improve the quality of event outcomes.

Declaration by author

This thesis is composed of my original work, and contains no material previously published or written by another person except where due reference has been made in the text. I have clearly stated the contribution by others to jointly-authored works that I have included in my thesis.

I have clearly stated the contribution of others to my thesis as a whole, including statistical assistance, survey design, data analysis, significant technical procedures, professional editorial advice, and any other original research work used or reported in my thesis. The content of my thesis is the result of work I have carried out since the commencement of my research higher degree candidature and does not include a substantial part of work that has been submitted to qualify for the award of any other degree or diploma in any university or other tertiary institution. I have clearly stated which parts of my thesis, if any, have been submitted to qualify for another award.

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<u>Publications during candidature</u>

Peer-reviewed papers:

Fairley, S., & **Kelly, D.M.** (2017). Developing leveraging strategies for pre-Games training for mega-events in non-host cities. *Marketing Intelligence & Planning,* 35(6), 740-755.
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Contributor	Statement of contribution
Donna M. Kelly	Designed and conceptualised the study (70%) Collected data and led data analysis (80%) Drafted the first version of paper (100%) Revised and rewrote subsequent versions (80%)
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None.

Research Involving Human or Animal Subjects

The UQBS Ethical Review Committee granted ethics approval for the research carried out for this thesis on October 15, 2015. A copy of the ethics approval letter is included in the thesis as Appendix G.

Personal

I am acutely aware that I stand on the shoulders of giants. Some have gone ahead and many are still here with me. In memoriam, Dada- wish you were here to see this moment; Maa & Papa- I would be nothing without you; Auntie Norma- your incredible smile, love and belief in me is missed.

To my incredibly devoted mom- Mummy you truly embody selfless and unconditional love. Your unwavering support, sage advice and just simply nourishing my soul is a wonder. You are the best mom ever and I dedicate this degree to you and the boys. To my boys- Dejhon and Xhaevion. You are the reason I do this every day. I could not have asked for a better pair of sons. I love you so much. Thanks for being there for me and I hope I have inspired you to dream big and act bigger! Phyll your support and sacrifice for this journey is deeply respected. Thank you for being there in the good and bad times. To the rest of the family and friends, you have just been simply phenomenal! Thank you for the many acts of generosity and making sure I was doing well. GT (Jamaica) and Riverlife (Australia) family nuff love!

I have set the Lord always before me; because He is at my right hand, I shall not be moved.
Psalm 16:8

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<u>Dedications</u>

I dedicate this research to my boys, Dejhon and Xhaevion.

Mummy, I hope I have made you the proudest mom on earth!

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CHAPTER 1 -   INTRODUCTION

1.1   The event landscape

The tourism industry has undergone significant diversification and expansion over the last six decades to become one of the world's fastest growing economic sectors (UNWTO, 2017). Events are a major component of the overall tourism sector (Bowdin, Allen, O'Toole, Harris, & McDonnell, 2011; Getz, 2008; Getz & Page, 2016; Hall, 1989; Perna & Custódio, 2008). The capacity of events to fast-track development projects, galvanise government support and funding, and ignite a "feel-good" spirit among residents (Bason, Cook, & Anagnostopoulos, 2015), are only a few of the reasons that make them attractive tools for destination development.

Since ancient times, events have been a central part of human existence and used for a variety of reasons, such as leisure, religious, education, and as revenue generator (Inskeep, 1991). Although events can be traced back several centuries, it was not until the mid-1980s that the systematic and focused use of events in generating tourism benefits for a host destination gained prominence (Burns, Hatch, & Mules, 1986; Kellett, Hede, & Chalip, 2008; Mair & Whitford, 2013). In 2015, direct spending in the events sector in the United Kingdom (UK) totalled £41.4 billion (Statista, 2017). This spending is a testament to the importance and contribution of the event sector to a country's economic growth.

One of the prime purposes for staging an event is to derive economic benefit (Kang & Perdue, 1994; Kasimati, 2003; Kim & Petrick, 2005; Matheson, 2009a). However, there is evidence to suggest that the purported economic benefits are rarely realised. While the predictions of ex ante economic impact studies tend to be positive, the ex post reality is the opposite (Crompton, 1995; Crompton & McKay, 1994; Matheson & Baade, 2004; Porter & Fletcher, 2008), as benefits are often overestimated and costs are often underestimated (Jones, 2001; Porter & Fletcher, 2008). Research has shown that the expected economic benefits that are announced prior to the event do not actually materialize after the event (Crompton, 1995; Crompton & McKay, 1994; Dwyer, Forsyth, & Spurr, 2005; Matheson, 2009d; Mules & Faulkner, 1996; Porter & Fletcher, 2008). Although economic benefits from events are given greater attention and recognition, there are other forms of benefit that can accrue from event hosting. These other forms of benefits that can be gained through the hosting of events include social (Kim, Gursoy, & Lee, 2006; Misener & Mason, 2006; Waitt, 2003) and environmental (Deccio & Baloglu, 2002; Murphy, 1985).

Notwithstanding its benefits, it is important to acknowledge that the value of hosting events, particularly large events, is often questioned (Deccio & Baloglu, 2002; Ritchie, 1984). In fact, events can be polarising, even viewed as a contested activity (Lenskyj, 2002, 2014). For example, there is great debate surrounding whether or not an event has in fact created benefits. Further, where benefits

are said to have accrued, there is often disagreement about how those benefits are shared, which stakeholders are recipients versus those who have not benefitted (Taks, Kesenne, Chalip, Green, & Martyn, 2011). Certainly, in the case of the Olympic Games, this event has been characterised as a "circus" (Cashman, 2002) and has met great opposition as residents of various applicant cities, candidate cities or host cities, register their objections to the event being hosted in their locality (Rundio & Heere, 2016; Waitt, 2003). The objections are strong, given the maleficent attendant issues of debt (Bason et al., 2015), the creation of "white elephants" (Carlsen & Taylor, 2003; Cashman, 2002, 2003), congestion (Jones, 2001), and social exclusion, to name a few.

Nevertheless, even as these debates continue, large events are increasingly being staged around the world. Undoubtedly, their prevalence signals the central role that events play in many of the world's economies (Statista, 2017). Given the prominent use of events to achieve destination objectives, it is necessary for us to broaden our knowledge of events, specifically, how to leverage the desired benefits from hosting them. As events continue to occupy an important position in advancing growth and development agendas, our understanding of how to better leverage them will become even more critical.

Indeed, destinations are increasingly using events (Getz & Page, 2016; Jago et al., 2003; Ziakas, 2018), either stand-alone or as a part of an event portfolio, to achieve certain strategic goals. The strategic planning and use of events, either singularly or as part of a portfolio, to optimise and spread the benefits from event hosting is known as event leverage (Chalip, 2004; O'Brien, 2006; O'Brien & Chalip, 2008).

1.2   Event outcomes: event impact, event legacy, and event leverage

The use of events from a tourism perspective has not always been strategic. Instead, the discourse around event outcomes evolved from an impact perspective. An impact perspective focused largely on tangible or 'hard' outcomes – outcomes that were rarely intentionally or purposefully planned (Shipway, 2007). Although impacts can be labelled as immediate or long-term, the early focus centered around the immediate impacts of events (Kim & Petrick, 2005; O'Brien, 2006; Preuss, 2007a). Cities often bid for and staged events with the expectation of benefits (Crompton, 1995; Daniels & Norman, 2003), but with little if any deliberate planning for achieving those benefits. As a matter of course, the impacts were automatically expected (Gursoy & Kendall, 2006; Shipway, 2007). While the term "impacts" dominated the early discourse, its use persists today, albeit to a lesser extent.

Later, event legacy became the preferred term for discussing the outcomes produced from the hosting of events. Event legacies are event outcomes that have their roots connected to the event itself and the results of which are said to endure into the future, well beyond the year of event hosting

(Chalip, 2017; Gratton & Preuss, 2008). The use of the term event legacy became evident as there was a shift in focus to define the long-term benefits that an event would generate (Chappelet, 2008; Matheson, 2010). This shift became urgent for three principal reasons. First, there was a greater need for politicians to justify scarce tax dollars earmarked or used to fund event hosting projects (Cashman, 2003; Girginov & Hills, 2008; Ritchie, 2000). Second, event legacy became an important inclusion in bid documents, indeed it became a prerequisite (Li & McCabe, 2013). Third, the institutionalisation of legacy in the Olympic Movement spurred widespread acceptance and changes (Leopkey & Parent, 2012a). Notwithstanding the prevalent use of the term legacy, there was a concerning trend. That is, legacies were outlined in the pre-event rhetoric, yet the post-event reality was often very different – as the purported legacy outcomes seldom eventuated (Chalip, 2018; Matheson, 2009a; Matheson & Baade, 2004; Porter & Fletcher, 2008).

The custom of making unsubstantiated claims about events producing certain impacts became untenable, as there were a growing number of examples to refute these claims (Bason et al., 2015; Bason & Grix, 2018; Crompton, 1995; Mules, 1998; Mules & Dwyer, 2005; Mules & Faulkner, 1996; Taks et al., 2011). As a result, event rights owners, organisers and 'boosters' needed to rethink their approach to deriving more enduring event benefits in order to secure government and other stakeholders' support (Chalip, 2018). Event leverage provided the platform to better articulate and buttress their message and to secure support for the event (Chalip, 2018). Event leverage is a strategic approach to planning the specific benefits to accrue from events by devising strategies and tactics that align with host community needs (O'Brien & Chalip, 2007). The planning of specific strategies to leverage events should begin at the conceptualisation stage (Chalip, 2002, 2004). Thus the leveraging strategy, and not the event, is seen as the intervention (Chalip, 2004, 2017). This is the main element used to differentiate event legacy from event leverage.

Event leverage seeks to extend and broaden our knowledge of event benefits, by understanding how event outcomes can be planned and executed to optimise the related benefits (Chalip, 2000, 2004, 2014, 2017). The key merit of event leverage is its strategic approach to devising benefits (O'Brien & Chalip, 2007). Using the analogy of Chalip (2014), strategically using events is not so much about the fact that destinations have a mix of events, a "toolkit" (event portfolio) if you will, but how destinations utilise all the tools in the toolkit for greater benefit (leverage).

As a strategic approach, the practice of leverage has been used to achieve a variety of event outcomes (Chalip, 2000; Chalip & Costa, 2005). For example, event leverage has been used to distribute event benefits over a wider area, including to non-host cities (Fairley & Kelly, 2017; Kellett et al., 2008), and encourage sport participation in host communities, and through sport clubs (Chalip, Green, Taks, & Misener, 2017; Hoskyn, Dickson, & Sotiriadou, 2017; Taks, Misener, Chalip, & Green, 2013). Forging relationships by utilising an event portfolio mechanism (Ziakas & Costa,

2010), stimulating business opportunities, infrastructure development, and developing business relationships through stand-alone events are benefits that can be realised using leverage (Chalip, 2000; Chalip & Leyns, 2002; Chalip & McGuirty, 2004; Gardiner & Chalip, 2006; O'Brien, 2006; O'Brien & Gardiner, 2006). Even universities are leveraging events that are hosted in their communities to achieve strategic goals (Kennelly, Corbett, & Toohey, 2017). These advantages provided by the process of event leverage, make it an attractive proposition to be used by cities seeking to fully exploit the potential benefits to be gained from hosting events.

Notwithstanding the utility of event leverage as a viable tool and its capacity for harnessing benefits, as the ensuing review of literature will expound on, there are several areas that remain unclear. A brief overview of the gaps in the event leverage literature will be highlighted in this section. Three specific gaps have been identified. As a result, the overarching research aim of this PhD thesis has been conceptualised to examine the strategic use of event leverage in host destinations and its impact on stakeholders within host destinations.

First, although the events literature focuses heavily on mega-events, there is a dearth of information relating to medium and small events. In addition, while event rights have been indirectly investigated using mega-events (Pappalepore & Duignan, 2016; Raco & Tunney, 2010; Rogerson, 2009; Valle, 2012), albeit quite limited, there is a near absence of academic research focusing on the issues around event rights in relation to major events. This is a remiss as there are many more large events than mega-events. Furthermore, no study has examined the impact of event rights ownership in respect to leveraging benefits in a host destination. It is therefore unclear, how the formalised rules stipulated in hosting contracts impact efforts of the host city to leverage the event. This gap in the literature led to the formulation of Research Objective 1.

Research objective 1: To examine how formalised regulations of event rights owners impact how a host community can leverage an event.

Second, although there is substantial evidence in the literature regarding the leveraging of large-scale events, there is negligible research that has investigated event leverage in the context of small to medium-scale events (Misener, 2015). Small to medium-scale events offer valuable opportunities and advantages if integrated in the destination event offering (Higham, 1999). However, there is limited empirical evidence to show the impact of an event leverage strategy on small-scale events. Further, destinations have sought to leverage events of varying size, without due consideration for the application of the strategy and its potential effect in varying contexts. As contingency theory (Burns & Stalker, 1961) suggests, a strategy designed for a certain context should not be applied in another context without making relevant modification to suit the new context. This is so because managerial solutions are not automatically scalable. Thus, this lack of empirical research about the influence of leverage on small-scale events prompted the formulation of Research Objective 2.

Research objective 2: To explore the applicability of tourism leveraging strategies devised for mega-events on small-scale events.

Third, while the importance of relationships in event hosting are well established in the literature (Chalip & Leyns, 2002; O'Brien & Gardiner, 2006), little is known about the utility of relationships when applied to the context of event portfolios. That is, it is unclear how relationships are forged and maintained to support an event portfolio strategy. Additionally, there is little knowledge of how successful event portfolios are managed (Getz & Page, 2016; Ziakas, 2014b). Thus, little is known about how to develop relationships or collaborative efforts among event stakeholders when seeking to leverage a destination's event portfolio. Indeed, the limited examples in the literature have shown event portfolios to be unsuccessfully implemented (Pereira, Mascarenhas, Flores, & Pires, 2015; Ziakas, 2010) and where some success can be claimed, the process of implementation was *ad hoc*, lacking a formal strategy and coherent vision, and so the outcomes were really fortuitous (Clark & Misener, 2015; Ziakas, 2018; Ziakas & Costa, 2011b). The need to understand how relationships impact the leveraging of event portfolios motivated Research Objective 3.

Research objective 3: To understand how relationships can facilitate the creation and maintenance of an event portfolio.

Therefore, the foregoing gaps provided the impetus for the investigation conducted in this research project and formed the basis of the research objectives that are addressed in this thesis. The strategic use of events requires greater attention, to broaden our knowledge about the use and capability of leveraging. The next chapter reviews the current literature on event leverage and provides some discussion around the areas that lack clarity.

CHAPTER 2 -   LITERATURE REVIEW

2.1   Overview

Events have been long acknowledged as having the ability to deliver certain benefits to a host destination (Burns et al., 1986; Getz, 2007, 2008). Originally, the benefits from events were described as impacts, and were primarily discussed in economic terms. However, impacts are now regarded in broader terms such as socio-cultural (Fredline, Jago, & Deery, 2003; Teo, 1994) and environmental (Collins, Jones, & Munday, 2009). Early research on event impacts focused on assessing event benefits from an immediate timeframe. Additionally, the impacts of mega-events were not only viewed as immediate outcomes, but were largely limited to impacts that were tangible in nature (Dwyer et al., 2005; Hall, 1992; Ritchie, 1984). Notwithstanding this norm, longer term impacts were also produced. While the physical or built assets from the hosting of an event, such as stadia and roads, were touted as a lasting benefit, their post-event uses were generally unplanned (Chalip, 2000). This resulted in the under-utilization of many event facilities after the event and creates what are known as 'white elephants' (Carlsen & Taylor, 2003; Cashman, 2002, 2003; Mules, 1998). As a result, there are previous host cities that have demolished some stadia and event facilities, as the earnings were not sufficient to maintain their post-event existence (Chalip, 2000, 2002). For example, several stadia constructed for the Seoul 2002 FIFA World Cup Finals were demolished after the event (Taylor & Edmondson, 2007). Many of the venues and facilities that were constructed for the 2004 Athens Olympic Games have deteriorated as they received little post-event attention or have been re-purposed (Boukas, Ziakas, & Boustras, 2012).

These temporal effects of impact became inadequate to justify significant government funding and so long-term benefits were favoured as they provided justification of government spending (Girginov & Hills, 2008; Kasimati, 2003). Long-term benefits were expected as a return on the resources that were invested to host the event (Chappelet, 2008). Thus, the focus shifted from short-term impact to the long-term benefits, which are known as 'legacies' (Chappelet, 2012).

The term legacy was used to describe outcomes generated from the event and lasting well beyond the event year (Preuss, 2007a). Legacies are now considered to be long-term, planned and unplanned, and offer both tangible and intangible outcomes (Cashman, 2003; Chappelet & Junod, 2006). Legacy therefore focuses on the long-term benefits that an event provides to a host city, nation and its residents (Boukas et al., 2012; Ritchie, 2000; Thomson, Schlenker, & Schulenkorf, 2013). Although legacy is useful, according to Chalip (2018) it does not go far enough. That is, using the rhetoric of legacy in government documents, promotional efforts, and speeches is not the same as strategically planning for the legacy to occur.

For example, event rights owners, in particular the International Olympic Committee (IOC), have been criticised for the legacy (or lack thereof) that their events leave (Lenskyj, 2002). The criticisms levelled by disgruntled stakeholders, highlight what they believe to be the unequal distribution of benefits. Many believe that elites, and not the majority of residents, benefit from events that often have significant subsidies, financial and otherwise, coming from national governments (Hiller, 2000a; Whitson & Horne, 2006). Although the IOC has amended its Olympic Charter to reflect its role in promoting "a positive legacy from the Olympic Games to the host cities and host countries" (International Olympic Committee, 2013, p. 19), and therefore now evaluates each applicant city on the legacy component contained in its application, there are some challenges. First, accountability for ensuring the realisation of legacy is often unclear, at best; ownership of this role is often not clearly defined. Organising committees are preoccupied with delivering the event and therefore cannot undertake the responsibility for ensuring legacy creation (Chalip & Heere, 2014). Second, in light of this, the longevity of legacy is uncertain, as responsibility for legacy creation is unassigned.

Furthermore, legacy is problematic, as economic claims are questioned (Taks et al., 2011), debt and under-utilised infrastructure become a burden to taxpayers (Bason et al., 2015), benefits are poorly distributed (Mules, 1998), increased tourism cannot be confirmed or attributed to the event, and residents grow increasingly skeptical. In order to solve some of these issues and maximise long-term sustainable outcomes, strategic planning is needed prior to the event (Boukas et al., 2012; Chalip, 2002; Girginov, 2012; Gratton & Preuss, 2008; Matheson, 2010; O'Brien, 2006; Preuss, 2007a). The strategic planning for optimising event benefits is referred to as event leverage (Chalip, 2004). The challenges have prompted calls to trade legacy for leverage (Chalip, 2018) – as leverage is touted as a more strategic and sustainable means of planning event outcomes.

2.2 Event outcomes: From impact to leverage

Event outcomes have been discussed in terms of the concepts *event impact, event legacy, and event leverage*. These concepts are integral in understanding the benefits derived from an event and how those benefits are achieved and used. Figure 1 below provides an overview of the progression of the discussion around event outcomes, from event impact to event leverage.
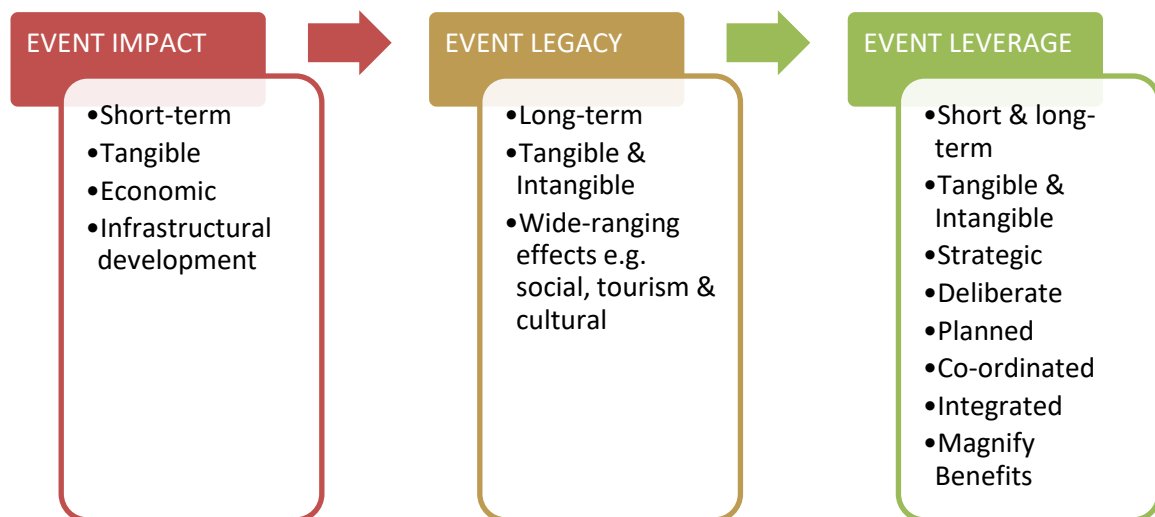
Figure 1: Progression of discourse on event outcomes

2.2.1 Event impact

The outcomes from events are integral to event staging. In fact, there is always a purpose or goal for staging events; as often, events are the means toward an end goal (Getz, 2007). Originally, the benefits produced by an event were described as "impacts" (Hall, 1992). The impacts from an event have also been referred to as benefits, effects (Li & McCabe, 2013; Roche, 1994) or outcomes (O'Brien & Chalip, 2007).

Event impacts are outcomes which treat the event in isolation, as the event is not integrated with the destination product or objectives (Chalip, 2006). Impacts can either be positive or negative (Ritchie, 1984; Spilling, 1996). An impact that is regarded as positive by one stakeholder may be deemed negative by another stakeholder. For example, increased visitors to a host destination may be a desirable positive impact from the perspective of a destination marketing organisation (DMO) which has the objective of increasing inbound visitors. On the other hand, the increased number of visitors may have a negative impact on residents by causing overcrowding and congestion within the destination (Jones, 2001). Nevertheless, with an event impact focus, opportunities that could be maximised for greater and long-term returns on the investment are lost. This is so because impacts represent only a 'snapshot' that is taken after the event (Chalip, 2004).

Furthermore, event impacts were predominantly viewed in terms of economic benefits (Andersson, Armbrecht, & Lundberg, 2008; Hall, 1992; Jones, 2001; Porter, 1999; Ritchie, 1984) and tangible attributes such as public works infrastructure, which include new stadia and transportation developed in the host city (Ritchie, 1984). Politicians and event organisers present figures and projections obtained from economic impact studies, usually showing positive outcomes from the event (Porter & Fletcher, 2008). However, research has indicated that economic impact

studies conducted after the event, fail to corroborate the positive projections made before the event, as they seldom occur (Crompton, 1995; Crompton & McKay, 1994; Dwyer et al., 2005; Matheson, 2009b; Matheson & Baade, 2004; Mules & Faulkner, 1996; Porter & Fletcher, 2008).

Although the predominant focus in the early discussions of event benefits was on economic impacts, there is now broad recognition that the discussion of impacts cannot focus solely on economic impacts (Carlsen & Taylor, 2003; Smith, 2014). According to Carlsen and Taylor (2003), it is possible for an event to have multiple impacts and so the measurement of the event's impact need to consider other variables. An event can produce both tangible and intangible costs and benefits (Carlsen & Taylor, 2003; Mules & Dwyer, 2005) and therefore some researchers and practitioners have called for an inclusion of these "intangibles" in any assessment to judge the contribution of the event (Dwyer, Mellor, Mistilis, & Mules, 2000). Impacts from the hosting of an event can take several forms (Jones, 2001; Roche, 1994; Spilling, 1996), including social (Jones, 2001; Kim & Petrick, 2005), tourism (Ritchie, 1984), urban renewal or regeneration (Ritchie, Shipway, & Cleeve, 2009), and environmental outcomes (Hall, 1992; Kim & Petrick, 2005; Ritchie, 1984; Ritchie & Yangzhou, 1987).

As the outlook changed from a prevalence on economic impacts, it became important to outline the long-term benefits that were expected as a return on the resources that were invested in hosting the event (Chappelet, 2008). There was a need to examine and discuss more broadly the benefits and costs produced by an event (Dwyer et al., 2000; Thomson et al., 2013), especially in light of the greater scrutiny and accountability that was demanded from the public (Dwyer & Forsyth, 2009; Jago, Dwyer, Lipman, van Lill, & Vorster, 2010). As a result, the term event legacy became synonymous with the long-term benefits from an event and a more accepted term (Chappelet, 2012).

In order to better understand the outcomes from events and their significance, a long-term approach to outcome evaluation was expected to be more useful and event legacy enabled this approach (Girginov, 2012; Preuss, 2007a). Therefore, host cities began to focus on positive long-term outcomes or event legacy. Preuss (2007a) opined that impact is distinct from legacy. According to Preuss (2007a), impact is a short-term effect that is caused by the event and is therefore not legacy. He contends that legacy has greater longevity. This longevity provides for a more sustainable approach to event hosting, in that the decisions that are made today to utilise a host city's resources are made by contemplating how future generations will also benefit (International Olympic Committee, 2013; Preuss, 2007a). Having this long-term outlook is a responsible attitude towards the stewardship of the host city's assets. An event legacy focus is important, as it provides a more sustainable pathway for utilising scarce resources. Also, because legacy planning is intentional, more thought is put in developing benefits that will be the right fit for the destination and endure beyond the end of the event (Girginov, 2012).

2.2.2 Event legacy

The use of the term legacy in the event management literature can be traced back to the 1980s (Chappelet, 2012). Around that time, the concept of legacy also emerged on the Olympic landscape (Cashman, 2003; Leopkey & Parent, 2012a). At that time, as an emerging term in the event management context, it was loosely used to mean the assets that remained after the hosting of an event. While the assets were specifically created for the event, their post-event uses were generally unplanned (Chalip, 2000). These assets were usually thought of as tangible items, such as road networks and stadia (Ritchie, 1984). Although several authors have sought to define the term legacy in the context of events, there still remains a lack of consensus on a universally accepted meaning (Cashman, 2003; Thomson et al., 2013).

For example, in defining legacy, Preuss (2007a) states that "irrespective of the time of production and space, legacy is all the planned and unplanned, positive and negative, tangible and intangible structures created for and by a sport event that remain longer than the event itself" (p. 211). According to Cashman (2003) legacy can be divided into six broad categories. These six categories of legacy are: economic; built and physical environment; information and education; public life, politics and culture; sport; and symbols, memory and history. However, Cashman's conceptualisation of legacy does not include timeframe, duration, scope, or scale (Preuss, 2007a). Despite the range of forms of legacy provided by Cashman (2003), there was a continued preponderance to discuss legacy from economic and physical dimensions (Kim & Petrick, 2005). Critics have argued that other constructs such as, social, cultural, environmental, political, urban regeneration, sustainability, community pride, education, tourism, sport participation, volunteerism, and knowledge transfer should be used as a means of classifying and evaluating the legacies from an event (Cornelissen, Bob, & Swart, 2011b; Dwyer & Forsyth, 2009; Leopkey & Parent, 2012b; Nichols & Ralston, 2014; Ramchandani, Davies, Coleman, Shibli, & Bingham, 2015; Smith, 2014). In another definition, Li and McCabe (2013) proposed legacy of mega-events to be "tangible and intangible elements of large-scale events left to future generations of a host country where these elements influence the economic, physical and psychological well-being at both community and individual levels in the long-term" (p. 390). This definition by Li and McCabe (2013) speaks to the core of what event legacy embodies. Event legacy is about using an event to create assets that will last well into the future and enhance the quality of living for residents on several levels, including economic, social, cultural, physical and psychological.

Legacy has been described as a multi-dimensional construct (Chalip, 2002; Chappelet, 2012; de Moragas, 2003; Ziakas & Boukas, 2012). In conceptualising how to define legacy, Thomson et al. (2013) note that the multi-dimensional character of event legacy made agreement on key attributes difficult, given variations in context. These attributes include terminology and source of legacy.

Nevertheless, Thomson et al. (2013) conclude that what is salient, is that whatever term is used to denote these benefits, it should be clearly defined, understood by all stakeholders and organisers and propagated in all event-related documents. In terms of timing, Thomson et al. (2013) note that event legacy should be planned, and the planning process should be at the conceptual stage of the event in order to increase the realisation of outcomes.

Event legacies are outcomes that owe their genesis to the event and the results of which last well beyond the hosting of the event. It has been suggested by some authors, that legacies are best evaluated several years after the event – some scholars have put forward a period of 15 years post-event for this evaluation (Gratton & Preuss, 2008; Matheson, 2010). Whereas Chalip (2017) identifies that event *impacts* only truly become event *legacies* when they endure beyond a 10-year period. While legacy is a long-term effect that persists well beyond the event, it is also true that aspects of event legacy can be realised at any point within the event lifecycle (Kasimati, 2003; Matheson, 2010; Smith, 2014).

The use of the term event legacy became more prolific as a result of the increased need to outline long-term benefits from an event (Chappelet, 2008; Matheson, 2010). The shift in focus to legacy was fuelled mainly by the following reasons. First, as a justification from politicians and event organisers for the use of scarce tax dollars to fund projects related to hosting mega-events (Baade & Dye, 1990; Cashman, 2003; Girginov & Hills, 2008; Ritchie, 2000). It is used as an event implementation strategy (Leopkey & Parent, 2012a) and as a means of strengthening the argument of candidate cities as they vie to be selected as host city (Leopkey & Parent, 2012a). However, this justification has spawned greater public pressure and scrutiny as it relates to transparency, accountability and the efficient use of public funds (Andersson et al., 2008; Baade & Dye, 1990; Crompton, 1995; Mules & Faulkner, 1996). Second, event legacy is now an important prerequisite when bidding to host major events (Li & McCabe, 2013). Li and McCabe (2013) suggest that event organisers and committees are acknowledging the importance of legacy in terms of their potential to prolong and enhance the positive impacts of events. Third, perhaps the most significant is the institutionalisation of legacy in the Olympic Movement (Berger & Luckmann, 1967; Leopkey & Parent, 2012a). The three institutional phases of habitualisation, objectification and sedimentation are evident in the Olympic Movement's treatment of legacy (Leopkey & Parent, 2012a).

In 2003, the International Olympic Committee (IOC) amended its Olympic Charter to include Article 14, which is a mandate for candidate cities to identify in their bid proposals how hosting the Olympic Games will generate lasting legacies for the city (International Olympic Committee, 2013; Kaplanidou, 2012). The introduction of the Article generated an increased number of legacy programmes being outlined in bid documents. This action on the part of the IOC has dramatically altered the event landscape in terms of identifying and planning legacies, as the Olympic Games are

often viewed as a model of best practice (Leopkey & Parent, 2012a, 2012b). This is highlighted by the strong legacy program, which was developed for the 2012 London Olympic Games. London was the first Olympic Games to be awarded after Article 14 was included in the Olympic Charter. The strategies that have been adopted by the IOC to improve the Olympic Games, in particular, to leave a positive legacy, have been diffused in non-Olympic Games events. In other words, not only has legacy become an institutionalised component of the Olympic Movement it has become an institutionalised element of event hosting in general (Leopkey & Parent, 2012a). Research has addressed the concept at the FIFA World Cup (Cornelissen, Bob, & Swart, 2011a; Cornelissen et al., 2011b; Preuss, 2007k), The Commonwealth Games (Carlsen & Taylor, 2003; Matheson, 2010) and the ICC Cricket World Cup (Majumdar, 2009; Tyson, Hayle, Truly, Jordan, & Thame, 2005).

While there is merit to the concept of legacy, that is the creation of long-term benefits, there have been some criticisms (Chalip, 2018). There is a real prospect of legacy failure for several reasons. For example, the term legacy and measurement thereof, is at best poorly understood or defined (Crompton, 1995; Dwyer & Forsyth, 2009). The entity/stakeholder that has responsibility for legacy is usually quite obscure (if known at all), thus contributing to the high risk of failure, as there is little or no accountability. Also, the specific legacy areas are vague (Cashman, 2009). Local organising committees are focused on event delivery and are therefore unable to carry out the task of stewarding legacy, which is not within their remit. Therefore, there are some fundamental challenges with the concept of legacy.

Furthermore, event rights owners and event organisers have been criticised for burdening countries, particularly developing countries, with significant debt, as a result of the investment needed to host events (Dowse & Fletcher, 2018; Lenskyj, 1996). Many of the economic claims that are made as part of the pre-event rhetoric are questioned, as the claims cannot be substantiated (Whitson & Horne, 2006). Often, events are heavily supported by national governments, through taxpayer dollars. However, it has been shown that boosters or elites who advocate for the hosting of events are typically major beneficiaries of the positive outcomes from the event, while the majority of the population does not experience any real gain (Taks et al., 2011). In fact, it is the taxpayers who are left with the tax burden (Bason et al., 2015) as the benefits are poorly distributed (Mules, 1998). According to Chalip (2018), event rights owners, advocates and organisers secure their interests by promoting legacy. However, Chalip (2018) contends that legacy is not viable and so scholars and public officials should not play along with event boosters. Instead, an event leverage approach should be adopted because it "is not merely a generative framework; it is the more fulfilling framework for practice" (p. 37).

Legacies have to be decided upon and someone, or some entity, has to be entrusted with responsibility for legacy and its funding (Nichols & Ralston, 2014). This process can be influenced by the political agenda and an administration's philosophy towards the hosting of large-scale events.

Change in administration and the economic climate can also affect ownership and funding of legacy (Nichols & Ralston, 2014). Furthermore, the possibility of attaining legacy is restricted by the separation of event delivery and legacy responsibilities. That is, the organization charged with the responsibility of delivering the event is usually not the same entity that will oversee the legacy programme (Nichols & Ralston, 2014). While this separation is necessary, an effective channel of communication and commitment to collaboration should be features of the inter-organization relationship, which will be necessary to facilitate both event delivery and management of the legacy programme.

In summary, event legacy has been accepted as a useful concept by both academics and practitioners (Sant et al., 2013; Thomson et al., 2013). However, there is a lack of consensus on issues such as a precise definition (Cashman, 2003; Thomson et al., 2013), conceptualisation (Cornelissen et al., 2011b; Gratton & Preuss, 2008; Preuss, 2007a) and how legacy should be measured. Additionally, how to plan for and manage legacy are both unclear (Gratton & Preuss, 2008; Li & McCabe, 2013; Matheson, 2010; Ritchie, 2000; Sant et al., 2013), but it is understood that the culture and context within which legacy is to be implemented will influence its effectiveness. While legacy places focus on long-term event outcomes, the weaknesses outlined earlier, make it redundant as a strategic approach. It does not go far enough in analysing or utilising events with a more critical and strategic perspective. As a result, Chalip (2018) calls for the need to trade legacy for leverage, since event leverage offers a sustainable and strategic approach for event utilisation.

2.2.3 Leveraging events

Positive outcomes from hosting events do not just occur as a matter of course (Chalip, 2014). Instead, events must be leveraged in order to optimise desired outcomes (Chalip, 2004). Event leverage views the event as "seed capital" from which strategies can be based in order to achieve both short- and/or long-term outcomes (O'Brien, 2006). Event leverage is defined as "the phenomenon of strategically planning for the maximisation of both short-term and long-term event outcomes" (O'Brien & Chalip, 2007, p. 297).

The antecedents of event leverage are linked to leverage theory in the strategic management (Collis & Montgomery, 1995) and finance disciplines (Misener, 2015). Leverage theory has been traditionally used to explain the management of a portfolio of assets (Markowitz, 1952). Effective leveraging of an asset portfolio is built on the premise that the most suitable assets are selected for inclusion in the portfolio and that a range of asset classes (diversification) are also included, to spread the overall risk within the portfolio (Markowitz, 1952). Stemming from this, the first work in event leverage considered how a portfolio of events could be used to maximise the tourism and trade

benefits for a host city (Chalip, 2004). The concept has been usefully applied to understand and justify government spending on large-scale events (Smith, 2010, 2014; Smith & Fox, 2007).

According to Smith (2014), there was an "emerging consensus that mega-events cannot be justified by their impacts alone" (p. 16). Hence the shift from impact to leverage became necessary. This shift from impact to leverage has been described as subtle but profound (Chalip, 2002; O'Brien & Chalip, 2007; Smith, 2014). The shift is meaningful because it offers a useful perspective with which to tactically utilise events to achieve specific results (Chalip, 2006). O'Brien and Chalip (2007) suggest that the shift from impact to leverage is fundamental because the traditional *ex post*, impact-driven, outcomes orientation of event impact may not be suitable where greater benefits are being sought. The shift in focus has given rise to the increased discussion and scholarly works about event leverage (Chalip, 2004; Kellett et al., 2008; Misener, 2015; O'Brien, 2006; Smith, 2014; Ziakas, 2014b). This shift to an *ex ante* perspective is paramount to event leverage – a means to optimise event benefits and expedite national development by purposefully considering the desired event outcomes prior to the event (Chalip, 2004, 2006, 2014). Therefore, event leverage deliberately, proactively, and prospectively contemplates not only short-term outcomes, but long-term outcomes (O'Brien & Chalip, 2008). Event leverage seeks to obtain maximum benefit from the available resources around the event (O'Brien, 2006). By using the event as the fulcrum, the process of achieving planned outcomes is aided, thereby removing the mindset that benefits will occur automatically.

Much of the research that has investigated leverage, has done so by examining benefits that can be classified as economic benefits. However, outcomes leveraged from events can be classified not only as economic, but can include sociocultural and environmental benefits – known as the triple bottom line (TBL) (Beesley & Chalip, 2011; O'Brien & Chalip, 2008). It is not surprising that the majority of the research on leverage has an economic view, given the dominant view of considering event benefits primarily based on economic and tangible (hard) returns. More recently however, researchers are giving more attention to the leveraging of a wider range of event outcomes, including the more intangible or 'soft' impacts, such as social and cultural outcomes (Derom & VanWynsberghe, 2015; Hoskyn et al., 2017; Misener, 2015; Schulenkorf & Edwards, 2012; Schulenkorf & Schlenker, 2017; Schulenkorf, Schlenker, & Thomson, 2017; Taks, 2013; VanWynsberghe, Derom, & Maurer, 2012). Sociocultural benefits leveraged from events are about improving the social and cultural fabric of people. Generally, sociocultural event outcomes relate to social development and can include enhancing community/national pride and spirit, encouraging social cohesion and capital, increasing sport participation, promoting social change, fostering feelings of euphoria, and preserving and showcasing cultural traditions (García, 2001, 2004; Heere et al., 2013; Misener, 2015; Misener & Mason, 2006, 2009; Reis, Frawley, Hodgetts, Thomson, & Hughes,

2017). Events have also been used to leverage environmental benefits for a host destination. Environmental benefits are not limited to the sustainable use of events but also involve urban regeneration (Andranovich, Burbank, & Heying, 2001; Chalkley & Essex, 1999; Smith & Fox, 2007). In addition, the genre of event being studied is expanding beyond the usual competitive sport event to also include charitable events (Goodwin, Snelgrove, Wood, & Taks, 2017; Snelgrove & Wood, 2010).

Perhaps the most referenced and the first explicit use of the concept of event leverage for optimising tourism benefits, is highlighted in Australia's efforts to capitalise on the projected gains expected to accrue from hosting the 2000 Sydney Olympic Games (Chalip, 2000, 2002; Gardiner & Chalip, 2006). From the outset, a main objective for bidding to host the 2000 Olympic Games was to generate certain benefits for the Australian state of New South Wales (NSW), in particular the city of Sydney, and the country more broadly. The Australian Tourist Commission (ATC, now renamed as Tourism Australia) became involved with the Games due to its public relations and promotions efforts to support the Sydney 2000 bid (Morse, 2001). The public relations interest by politicians and destination marketing organisations (DMOs) like the ATC, is a common practice to advocate for the public support of events (Chalip, 2018; Whitson & Macintosh, 1996). As the premier tourism marketing agency for Australia, the ATC recognised the tourism value that could be gained from hosting the Olympic Games. After the awarding of the hosting rights to Sydney in 1993 for the 2000 Olympic Games, the ATC took a formal and coordinated approach to leverage tourism benefits from the hosting of the event (Morse, 2001). This leveraging of tourism outcomes was developed on four core strategic elements: "repositioning the country by capitalising on media; aggressively seeking convention business; minimising the diversion effect of the Games; and promoting pre- and post-Games touring" (Chalip, 2002, p. 8). Specific tactics were devised to support the attainment of each strategic element. For example, the promotion of Australia, to create exposure and enhance the image of the country was a key strategic element. The ATC implemented a AUD$12 million four-year Olympic strategy for media relations and branding partnerships (Morse, 2001). Key tactical initiatives included, the development of joint promotions with Olympic sponsors such as Visa International, Kodak, and Air New Zealand were estimated to have generated a further AUD$160 million of promotion for Australia (Morse, 2001). The creation of a major media marketing campaign, which included a visiting journalist programme (Chalip, 2000, 2002; Morse, 2001), assisted the efforts to reposition Australia by utilising the media, specifically external media. There was also a post-Games strategy to capitalise on the exposure gained and convert interest into actual visitors. According to Morse (2001) the strategy was instrumental in Australia's increased visitor arrivals and the popularity of the country.

The event leverage blueprint of the 2000 Sydney Olympic Games was evident in the recently held 2018 Gold Coast Commonwealth Games (Fairley, Gardiner, & Filo, 2016; Reis, de Sousa-Mast, & Gurgel, 2014; Wicker & Sotiriadou, 2013). If done well, event leverage has the capacity to generate benefits such as event organisation skill and knowledge, a cohort of trained volunteers, which can be utilised for future events (Bramwell, 1997; Reis et al., 2014).

2.3   A framework for event leverage

Initial work on event leverage was influenced by sport events such as the 2000 Sydney Olympic Games (Brown, Chalip, Jago, & Mules, 2002; Chalip, 2002) and the Gold Coast Honda Indy car race (Chalip & Leyns, 2002). The earliest model of event leverage, based on leveraging an event portfolio, is displayed in Figure 2. The model suggests that a leverageable resource must first be identified, and meaningful opportunities crafted around the leverageable resource to stimulate benefits. Then, specific strategic objectives to capitalise on the opportunities, and means to achieve the objectives should be devised. Chalip's (2004) original model identifies the event portfolio as the leverageable resource. A destination's event portfolio refers to "the strategic patterning of disparate but interrelated events taking place during the course of a year in a host community that as a whole is intended to achieve multiple outcomes through the implementation of joint event strategies" (Ziakas, 2013a, p. 14). The utility of an event portfolio is seen in the destination's capacity to host a variety of events throughout the year (Chalip, 2004).

The opportunities on which to capitalise are the event visitors and trade, and the event media. Optimising total trade and revenue and enhancing the image of the host destination are the subsequent strategic objectives. The specific means to realise the strategic objectives of optimising trade and revenue include encouraging visitors to stay longer and spend more, retaining event expenditure within the host destination, and enhancing relationships between and among the local businesses. Additionally, the means to achieve the objective of enhancing the destination image include showcasing the host destination in event advertising and reporting and using the event in advertising and promotional efforts (Chalip, 2004).
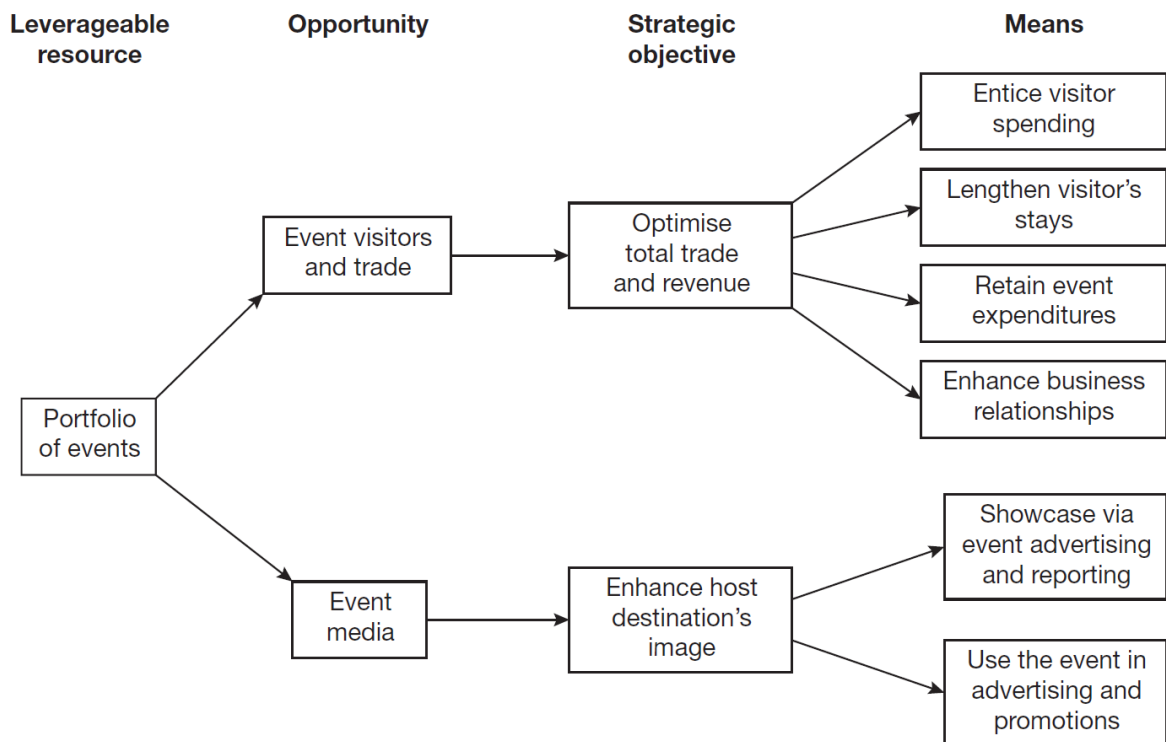
Figure 2: A schematic representation of event leverage (Chalip, 2004, p. 229)

2.3.1 Leverageable resource

The process of event leverage necessitates the availability of leverageable resources (Chalip, 2004). Leverageable resources are assets that can be used as "hooks" to maximise the benefits from event staging (Ziakas, 2014b). Leverageable assets commonly identified in the literature include: event portfolios (Chalip, 2004; Ziakas, 2010, 2014b); pre-event training camps for competing teams (Fairley & Kelly, 2017; O'Brien & Gardiner, 2006); visiting athletes (Kellett et al., 2008); professional teams (Sparvero & Chalip, 2007); and supporters of teams/athletes (Kellett et al., 2008). However, a clear method by which to identify leverageable assets is still unclear (Misener, 2015). As Kellett et al. (2008) state, the identification of leverageable event assets and the subsequent formulation of means to capitalise on the leverageable assets are a challenge when seeking to leverage an event. Nevertheless, it is of interest to determine how these assets are identified and selected, but there is little, if any, work that clearly outlines this process. Having an understanding of the factors that promote or prevent effective leveraging, may be useful to destinations in deciding how to identify leverageable assets and which assets are ultimately selected. While there are various types of leverageable assets, for illustrative purposes two types of leverageable assets – pre-event training and event portfolios – are explained below. These two leverageable resources have been the focus of a number of academic studies (Boukas et al., 2012; Fairley & Kelly, 2017; Gardiner & Chalip, 2006; Kellett et al., 2008; O'Brien & Gardiner, 2006; Ziakas, 2010, 2013a, 2013b, 2014b; Ziakas & Costa,

2011a, 2011b). Pre-event training are further discussed in section 2.3.1.1 and event portfolios are treated with in section 2.7.

2.3.1.1 *Pre-event training*

Pre-event training camps are conducted in the off season and/or the period just before a major competition when athletes meet for a training camp at a particular location leading into an event (Gardiner & Chalip, 2006). This training is said to enhance the competitors' performance and allows them a period of acclimatisation as they adjust to the conditions of the host destination (Gardiner & Chalip, 2006). Destinations can leverage the presence of athletes visiting for pre-event training to achieve targeted outcomes (Fairley & Kelly, 2017; Gardiner & Chalip, 2006). For example, the benefits of pre-event training include, fostering long-term relationships between /among athletes and supporters, promoting cultural exposure and learning, and generating a sense of excitement (Gursoy, Kim, & Uysal, 2004; Kellett et al., 2008; Kim & Petrick, 2005). Thus, as part of their leveraging strategy, destinations can attempt to attract visiting teams (O'Brien & Gardiner, 2006), visiting athletes (Kellett et al., 2008) or professional teams (Sparvero & Chalip, 2007).

Kellett et al. (2008) examined a particular programme that was designed to leverage the visiting teams for the 2006 Commonwealth Games hosted by the Australian state of Victoria. The leverage programme was developed by the Victorian State Government and cities were then expected to utilise the teams as they saw fit to ensure the attainment of the programme objectives. The *Adopt-A-Second-Team* initiative was instituted to operationalise the overarching policy of the Games and a specific theme of the event. Accordingly, "municipalities in Victoria (of which there are 79), were encouraged to "adopt a second team"- that is, a team from one of the 71 Commonwealth nations participating in the Games" (Kellett et al., 2008, p. 105). However, no state funding was provided to the cities for the implementation of the programme and this negatively impacted the implementation of the programme. The study reviewed two cities, namely Geelong and Port Phillip, which participated in the leverage programme. In particular, the study focused on the strategies and tactics developed by the two cities to create activities around the teams they were assigned, so as to maximise or leverage certain the benefits from the programme. Kellett et al. (2008) found that the two cities had very different outcomes due to variations in the vision of each city, the level of coordination given to the leveraging effort, and how organisational learning was viewed and valued.

The vision and leadership of a host city, can and does play a significant role in the outcomes realised (or the lack thereof) from a leverage programme. A study by Beesley and Chalip (2011), while supporting this point, goes further to identify other factors that can cause the failure of a leverage programme, to harness pre-event opportunities. The study sought to examine efforts to transfer knowledge learnt from 2000 Sydney Olympic Games related to non-host city leverage

initiatives, including pre-event leverage activities. The specific initiative was to transfer knowledge learnt from Sydney to Shanghai, to leverage benefits from the 2008 Beijing Olympic Games. That is, identify various opportunities that Shanghai, as a non-host city, could pursue (in the lead up to the event, during the event and the post-event phase) in order to capitalise on the Olympic Games that were to be held in Beijing. The study consisted of four phases with 63 persons interviewed. The authors found that efforts to transfer knowledge from an Australian non-host leveraging to Shanghai failed due to several factors. The methods of transfer were inappropriately framed, as the influence of differences in traditions/cultures, political systems, respect for authority and strong governmental controls were not mitigated (Beesley & Chalip, 2011).

Benefits from an event are generally concentrated around the host city. As Kellett et al. (2008) observe, the distribution of the event benefits, particularly large events, are generally poorly circulated; despite the fact that for large events all taxpayers beyond the host city may be subsidising the event. Therefore, benefits from an event should not be limited to the host city and its immediate environs (Beesley & Chalip, 2011; Kellett et al., 2008). By including non-host cities in the leveraging strategies that are developed, the benefits to be gained from the event can be spread to a broader cross-section of the population. Event leverage is viewed as an optimal tool to achieve a wider spread of the potential event benefits beyond a host city and its residents (Chien, Kelly, & Gill, 2017; Fairley & Kelly, 2017). Both pre-event training and adopt-a-team programmes are capable of dispersing event benefits to non-host cities.

Research has begun to focus on leveraging strategies that have been employed by non-host cities, as stakeholders in these areas seek to capitalise on the potential opportunities that may be presented by the hosting of an event in their country or state (Beesley & Chalip, 2011; Chien et al., 2017; Fairley & Kelly, 2017; Gardiner & Chalip, 2006; Kellett et al., 2008; Ritchie et al., 2009; Smith, 2010). In addition to the greater focus in academic research on non-host city leveraging, the practice within the event industry is becoming more widespread. For instance, in the recently held 2018 Gold Coast Commonwealth Games, event/sporting venues were located in 'event cities' of the host state, Queensland, not just the host city of the Gold Coast. Queensland's capital city, Brisbane, was the event city for shooting and indoor cycling events, while regional towns of Cairns and Townsville also hosted events (Gold Coast 2018 Commonwealth Games Corporation, 2018). Similar arrangements, to spread the benefits beyond the host city were also noted in the 2012 London Olympic Games, 2016 Rio de Janeiro Olympic Games, and the 2018 PyeongChang Winter Olympic Games.

2.3.2 **Opportunity, strategic objectives and means**

After the identification and selection of leverageable resources, a host destination can determine what appropriate opportunities, medium, or activities can be used to achieve the desired objectives. For example, in the event leverage model shown in Figure 2, event visitors and trade, and event media were targeted as the channels or opportunities by which to leverage the portfolio of events. Once the opportunity is determined the strategic objectives are developed and the means are outlined to attain the strategic objectives.

An objective is a shared goal that is expected to eventuate after the relevant process has been completed. The importance of setting objectives is found in its ability to promote a common vision that guides strategic direction and planning towards desired goals (Bell & Gallimore, 2015). Often, events are used to achieve destination and development objectives, yet there is a lack of understanding about the decision-making process to set said objectives. Events and event leverage have been studied primarily from an outcome or impact perspective (O'Brien & Chalip, 2008) and there is limited information on the development of strategic objectives to be leveraged from an event (Chien et al., 2017; Fairley & Kelly, 2017). The setting of objectives is integral to strategic management. While the strategic management literature can prescribe a process to set objectives, the decision-making process behind the setting of objectives is unclear. Furthermore, although there may be the setting of objectives, it has been shown that many objectives, contrary to the pre-event rhetoric, are not achieved (Bell & Gallimore, 2015; Minnaert, 2012; Ritchie et al., 2009). Therefore, it has been suggested that research should focus more on the analytical evaluation of event planning, which includes setting objectives, and implementation (Beesley & Chalip, 2011; Chien et al., 2017). The use of event leverage requires that host destinations view the setting of objectives as a strategic and methodical approach. However, the mechanics as it relate to the decision-making process to arrive at the strategic objectives and how the agreed objectives are implemented and evaluated is not clearly understood (Chien et al., 2017). Further, the process from conceptualisation through implementation and evaluation of leveraging strategies has received little attention.

One of the few studies that has sought to examine the processes and challenges of leveraging an event was conducted by Taks, Green, Misener, and Chalip (2018). In that study the authors used an action research approach, which is different from the methodology used in the majority of the previous studies. Using action research, Taks et al. (2018) examined the barriers to leveraging a sport event for sport participation. Specifically, the authors acted as consultants and facilitators to local sport organisations, observed and participated in the attempted leverage process, immediately prior to, during and after the event. Having the opportunity to closely observe the process, gave the authors a unique vantage point, which is not often seen in previous studies. The authors developed and used an event leverage framework (ELF) to examine the strategies and challenges associated with

planning, implementing, and evaluating event outcomes. The study concluded that while event leverage activities may appear to be straightforward to implement in order to encourage sport participation, this was not the case. Implementation of event leverage strategies required initiative, structural adjustment, human resource support that is dedicated to actively leverage the event, and collaboration (Taks et al., 2018).

2.4   Outcomes/Evaluation

It is important to acknowledge that goal-setting theory involves more than setting objectives, but goes further to evaluate whether the objectives were realised (Kennerley & Neely, 2003). According to Chien et al. (2017), setting objectives is a means to measure the attainment of event outcomes, as the appraisal of actual performance against objectives is critical to the evaluation process (Kennerley & Neely, 2003). Evaluation of outcomes is therefore a critical element of strategy formulation and implementation (Otley, 1999; Sterling, 2003). Although outcome evaluation is not explicitly presented in the original event leverage model, the ELF (Taks et al., 2018) clearly and rightfully incorporates outcomes. This inclusion is important as the primary focus of the current literature focuses on setting objectives and less so on how the strategies are developed prior to the event, and further the evaluation of objectives.

2.5   Event rights

It is clear that much of the discussions relating to event leverage, have been based on mega-events (Beesley & Chalip, 2011; Bell & Gallimore, 2015; Grix, 2012; Karadakis, Kaplanidou, & Karlis, 2010; Tichaawa & Bob, 2015). Mega-events are large-scale events with global appeal and media attention, and attract visitors who are either participants or spectators (Andersson et al., 2008; Mules, 1998). Hall (1997) categorises mega-events based on their reach, scale and impact, and highlights the far-reaching effect that an event can have within the host community. Hall (1997) notes that events can be used as a tool for economic and social stimulus and can assist (re)development initiatives within the host community. Events that can be classified as mega-events have significant visibility and include the Olympic Games, Fédération Internationale de Football Association (FIFA) World Cup, and the Commonwealth Games (Fourie & Santana-Gallego, 2011). The increased interest in mega-events as an economic and social tool is attributed to government leisure policies, the expansion of tourism, globalisation, and improvements in broadcast technology (Roberts, 2004).

The strategic use of large-scale events extends to the hosting of events that are owned by a rights holder and move from city to city for each successive edition of the event. Often, the appeal of these events is the unique culture that can be experienced in the host cities (García, 2001, 2004). The

ability to host the event in diverse locations and the benefit of showcasing the unique attributes of the destination, have been useful in the past to popularise the demand for hosting these large-scale events (García, 2001).

Rights-protected large-scale events are typically awarded to a host city as the result of a competitive bid process that takes place several years in advance of the event (Essex & Chalkley, 1999; Matheson & Baade, 2004). The highly competitive bid process to host mega-events in a particular city, underlines the value placed on securing the event and the allure to become a host city (Dansero & Puttilli, 2010; Rogerson, 2009). However, winning the bid is only the start of the task of delivering the event, as planning usually lasts several years, the logistical activities are complex and the associated costs are exorbitant (Davidson & McNeill, 2012; Gursoy & Kendall, 2006; Mules & Dwyer, 2005). The issue of rights is pertinent when considering the ownership and management of planned, medium to large-scale events.

2.5.1 Formalisation

When a city successfully bids for an event, it is awarded the rights to host that event. The host city then enters into a legally binding agreement with the event rights owner, to deliver the event according to the rules and regulations of the rights owner (Essex & Chalkley, 1999; Valle, 2012). These rules and regulations include the introduction of special legislation to safeguard the rights of sponsors, guidelines for the construction of venues and other facilities and the removal of advertising associated with brands that are not official sponsors of the event (Eick, 2010; Toohey & Veal, 2007; Valle, 2012). The stipulations are enshrined in what is known as the host city contract (HCC) or a host venue agreement (HVA). Taken together, documentation such as terms of references, guidelines, policies, and rules and regulations are a manifestation of the organisational structural element of "formalisation" (Amis & Slack, 2008; Fredrickson, 1986). Formalisation serves the purpose of bringing order to an operational system and prescribing the accepted behaviour and processes (Mintzberg, 1979).

Local organising committees (LOCs) are the entities tasked with delivering rights-protected events according to the stipulations contained in the host city contract. Therefore, this limits the extent to which LOCs can truly serve the needs of local stakeholders. For example, if there were to be any leveraging activity around a focal event, the LOC would not be ideally positioned to undertake that role, simply because non-event delivery activities, such as leveraging, are not within the purview of LOCs. Moreover, the sheer scope and complexity of event delivery activities would preclude this from happening. For these reasons, scholars have suggested that a separate entity, with the requisite funding, expertise and support, is needed to plan and leverage events (Chalip & Leyns, 2002; Misener, 2015).

While hosting contracts are a useful legal, administrative and operational tool, they are generally not viewed positively by non-rights holder stakeholders, as words such as "stringent" (McGillivray, 2011), "takeover" (Duignan & McGillivray, 2016; McGillivray, 2011), and "seizure" (Müller, 2017) are used to describe the content of such agreements and the outcomes of related interactions. While host contracts have the potential to direct the event, little is known about how host contracts help or hinder the leveraging of events. Given the drive to make events more sustainable and inclusive, it is useful to understand how formalised hosting contracts influence the efficacy of leveraging efforts for the local residents and businesses in host cities.

Given the complex structure of both the organisation-environment interface and the stakeholders, business agreements, transactions, and relationships are often formalised (Amis & Slack, 2008). The formalisation of partnerships can take different forms, one form being rules and regulations that are outlined in contracts. Contracts are useful to protect value/stakes, brand and standards and to guide operational activities (Valle, 2012). Contractual arrangements can be complex, complicated and commonplace, therefore it is not surprising that Atkinson, Waterhouse, and Wells (1997) would liken this landscape in which modern organisations need to function as a web of contracts. Furthermore, the details of contracts are not commonly made available to parties other than those who are signatories to the contract. As such, very little is known about how these contracts are framed and the impact that they can have on a strategy, such as event leverage.

Although the event literature focuses heavily on large-scale events, in particular, mega-events, there is a dearth of information relating to leveraging major events. The awarding of event hosting rights is an integral component of large-scale event hosting. Therefore, understanding how hosting contracts impact events, and the leveraging of events, is useful in drafting the terms of these agreements. Host contracts can set the tone and serve to shape interactions and relationships between and among stakeholders – ultimately influencing the extent to which a host city can leverage benefits from an event. Therefore the first objective of this PhD thesis is:

Research objective 1: To examine how formalised regulations of event rights owners impact how a host community can leverage an event.

2.6   Small-scale events

While large-scale events are supported by substantial public and private investment, the impact on local taxpaying stakeholders such as residents and local businesses, has been questioned (Pappalepore & Duignan, 2016). As a consequence, many cities seem to be shying away from hosting large-scale events (Lauermann, 2016; Rundio & Heere, 2016). This reticence is due in part to the increased public scrutiny and pressure from stakeholders to avoid the pitfalls that are commonly associated with large-scale event hosting (Bennett, Bennett, Alexander, & Persky, 2013; Clarey,

2014; Rundio & Heere, 2016; Whitson & Horne, 2006). For example, the 2019 Asian Games will now be hosted by the Indonesian cities of Jakarta and Palembang after Vietnam withdrew its capital, Hanoi, as host city (Trotier, 2016, 2017). The then Prime Minister of Vietnam, Nguyen Tan Dung, cited lack of funding and the continued effects of a financial crisis as the prime reasons for withdrawing as the host city (Associated Press, 2014; Reuters, 2014).

Similarly, the Chicago bid to host the 2016 Olympic Games came under severe opposition from civic groups (Rundio & Heere, 2016). The issues of displaced community members, facility construction, cost, and competence of officials were the primary areas of concern and motivation for the resistance. The civic groups went to great lengths to voice their opposition, with group members making overseas trips to speak directly to the International Olympic Committee (IOC) – the event rights owner for the Olympic Games. One group in particular, No Games Chicago, mounted a vocal opposition and received great national attention. Although the city of Chicago was selected as an applicant city by the United States Olympic Committee (USOC), the Chicago bid was ultimately unsuccessful as the IOC named Rio de Janeiro as host city for the 2016 Olympic Games. The failure of the Boston 2024 bid, withdrawn after encountering great public opposition, further highlights the tension between cities and boosters/advocates who desire to stage large-scale events (Lauermann, 2016; Rundio & Heere, 2016). It has been suggested that this tension that is evident in applicant or host cities between residents opposing the event and elites who advocate for the hosting of the events, is largely due to discrepancies between the predictions of ex ante economic impact studies which tend to be positive, and the ex post reality which is often opposite (Crompton, 1995; Crompton & McKay, 1994; Matheson & Baade, 2004; Porter & Fletcher, 2008).

The opposition is primarily due to the significant costs of staging large-scale events and the high probability of host countries being saddled with high debts post event. Mega-events require significant capital outlay to prepare the host city with the requisite facilities and infrastructure necessary to support the staging of the event (Davidson & McNeill, 2012; Gursoy & Kendall, 2006). These facilities and significant infrastructure development include, wide-scale physical improvements, technological capabilities, human resources, financial resources (Gursoy & Kendall, 2006; Matheson & Baade, 2004) and organizational resources (Hall, 1992). These investments often involve billions of dollars of public and private funds (Mules & Dwyer, 2005; Preuss, 2005; Stokes, 2006), with public funds typically accounting for the larger percentage (Andersson et al., 2008; Mules & Dwyer, 2005; Mules & Faulkner, 1996).

Mega-events often have a significant economic strain on the destinations that host them (Porter & Fletcher, 2008; Whitson & Horne, 2006). The 1976 Montreal Olympics left the city with a debt of over CAD$2 billion, which took thirty years to repay (Davidson & McNeill, 2012; Hiller, 2000a; Lenskyj, 2014; Taylor & Edmondson, 2007; Whitson & Horne, 2006). Prior to the hosting of

the 2000 Sydney Olympic Games it was estimated that the Australian Government would invest AUD$2.3 billion with an additional AUD$1.2 billion of private expenditure (Arthur Andersen/CREA Report, 1999). Calculations completed post event showed that AUD$6.6 billion was invested in the 2000 Sydney Olympic Games (Auditor General, 2002). Similarly, more recent editions of the Games, perpetuate this pattern of exorbitant spending. It has been estimated that €9 billion was spent on the 2004 Athens Olympics (Deng & Poon, 2011) and the 2008 Beijing Olympics was estimated to cost over US$20 billion (Matheson & Baade, 2004; Owen, 2005).

Despite the significant financial investment required for development and operating costs, many cities and nations are still willing to host mega-events because of the purported potential benefits to be realised (Dwyer et al., 2005; Dwyer et al., 2000; Madden, 2006; Mules, 1998). Potential benefits have included enhanced destination competitiveness, diversified tourism product in the host city and nation, increased participation and physical activity of residents, upgraded event facilities and transportation infrastructure, as well as the enhanced political and global standing of the host country (Dwyer et al., 2005; Fayos-Solá, 1998; Getz, 2007, 2008; Matheson, 2010; Mules & Faulkner, 1996; Roche, 1994; Sant et al., 2013). Increased employment generated by the activities to deliver the event (Dwyer et al., 2005; Mules & Dwyer, 2005), visitor expenditure from the influx of visitors and tax revenue also represent potential benefits (Mules, 1998). As a consequence, mega-events are now being utilised in a more purposive manner to drive national objectives (Jago et al., 2010).

However, benefits are often overestimated and costs are often underestimated (Jones, 2001; Porter & Fletcher, 2008; Whitson & Horne, 2006). Research has shown that the expected benefits that are announced prior to the event do not actually materialise after the event (Crompton, 1995; Crompton & McKay, 1994; Dwyer et al., 2005; Matheson, 2009d; Mules & Faulkner, 1996; Porter & Fletcher, 2008). This information is often utilised to criticise governments' use of taxpayer money to support mega-events. Also, as most economic impact studies do not show positive results, proponents of events have highlighted that event impact need not be economic (Carlsen & Taylor, 2003).

Taxpayers and residents of host cities have demanded greater accountability and transparency of tax dollars earmarked for, or spent on mega-events (Andersson et al., 2008; Baade & Dye, 1990; Crompton, 1995; Mules & Faulkner, 1996). With increased scrutiny of government expenditure on mega-events, maximization of funding spent on events is imperative (Andersson et al., 2008; Baade & Dye, 1990; Girginov & Hills, 2008). In order to respond to the public scrutiny of government funded mega-events, there has been increased focus and effort on showcasing the benefits of the event to the host city, region, and country (Li & McCabe, 2013).

Notwithstanding the potential positive benefits that a mega-event can produce, there are also negative impacts that can result from the hosting of a mega-event (Cashman, 2002; Walo, Bull, & Breen, 1996). Negative impacts from a mega-event include acculturation (Page & Connell, 2009); environmental degradation and high costs (Cashman, 2002); debt (Jones, 2001; Roche, 1994); social dissension and cultural elitism (Lenskyj, 2014; Ritchie, 1984); overcrowding; increased prices for real estate (rent/property values); and relocation of vulnerable population groups, including low-income and homeless persons, away from prime areas adjacent to mega-event venues (Hall, 1994; Lenskyj, 2014). Resident dissension is also a frequently cited problem associated with mega-events (Cashman, 2002; Dwyer et al., 2000; Fredline & Faulkner, 2001a, 2001b; Kaplanidou, 2012; Karadakis & Kaplanidou, 2012; Lorde, Greenidge, & Devonish, 2011). Usually opposition is in relation to the allocation of government spending, disruption to the daily life of residents, and social and humanitarian injustice (Hiller, 2000a; Jones, 2001; Mules & Dwyer, 2005).

While the majority of research on event leverage has focused on large-scale events, recent research has begun examining leveraging of small-scale events (Clark & Misener, 2015; Goodwin et al., 2017; Pereira et al., 2015; Schulenkorf & Schlenker, 2017; Taks, Chalip, & Green, 2015; Taks et al., 2013). It has been suggested that small-scale events are more sustainable than large-scale events as they rely on the existing infrastructure, thereby reducing negative impacts such as debt, congestion and crowding (Gibson, Kaplanidou, & Kang, 2012; Higham, 1999). Although the utility of small-scale events is supported in the literature, the literature has not been clear about how the size of an event can influence the leveraging of those events. Size is a significant factor that can impact a managerial strategy (Neilsen, 1974), such as event leverage. If the tenets of contingency theory are expected to hold true, then special considerations need to be applied to small-scale events when being leveraged. However, the literature around these special considerations is not well developed. This understanding can be useful to assist event owners, tourism organisations and DMOs to effectively plan, implement and monitor strategies to leverage small-scale events.

2.6.1 Contingency theory

While the majority of research on event leverage has focused on large-scale events, the principles of event leverage have also been taken and applied to small-scale events without making adjustments for the nuances of small-scale events. Yet, understanding the nuances of small-scale events is important as contingency theory (Burns & Stalker, 1961) posits that the effectiveness of a strategy is influenced by the size of the organisation (Neilsen, 1974; Schreyögg, 1980). Therefore, a strategy that has been utilised in a specific context cannot be expected to have similar results in another context, without appropriate and suitable adjustments being made (Shenhar, 2001).

Further, while large-scale events are often run through organising committees that are formed for the sole purpose of running the event (Halbwirth & Toohey, 2001; Parent, 2008), many small-scale events are owned and managed by the same person (Getz, MacDonald, & Parent, 2015). Yet, the perspective of event owners is often ignored in the literature (Getz et al., 2015). The form of event ownership is open to great variations as events differ significantly; owners have different priorities and as such set goals that are unique to the ownership; and stakeholders also have different goals which should be considered and integrated in goal-setting activities (Getz et al., 2015). As a key stakeholder group in the event space, it is therefore pertinent to understand and include the views of small-scale event owners/managers when seeking to understand how small scale events are leveraged. Therefore, Research Objective 2 is:

Research objective 2: To explore the applicability of tourism leveraging strategies devised for mega-events on small-scale events.

2.7   Event portfolios

While leveraging strategies can be used to maximise the benefits from a single event, it is possible to combine events hosted within a city and determine overarching leveraging strategies for an event portfolio (Getz, 2005, 2008). A portfolio of events is generally comprised of recurring events, one-off mega events (Ziakas, 2014b), and smaller affiliated events (Smith, 2010). Viewing a destination's events as a portfolio allows destinations to have a more integrated approach to the strategic use of events, with greater potential to maximise resources and optimise benefits (Ziakas, 2013a, 2014b; Ziakas & Costa, 2011a). By having an overarching theme that connects the events within the portfolio, the destination is better able to plan and utilise its limited resources to achieve multiple outcomes by employing joint strategies (Ziakas, 2014b, 2018).

Like financial portfolios, event portfolios seek to manage risk through diversification (Iverson, 2013; Markowitz, 1952). By identifying and selecting the most suitable or efficient assets to be included in a portfolio, the investor enhances the prospect of improved performance and higher yield (Brinson, Hood, & Beebower, 1986; Markowitz, 1952). However, it is important to note that events are socio-cultural constructs. Therefore, the higher yield may not be defined in financial terms. Instead, various objectives and outcomes that value social and cultural benefits may also be considered alongside, or even above, financial outcome (Ziakas & Costa, 2011a). Taking this view, destination stakeholders can methodically target, evaluate, and develop events that provide maximum value to the destination (Getz, 2008). Event portfolios are therefore defined as "the strategic patterning of disparate but interrelated events taking place during the course of a year in a host community that as a whole is intended to achieve multiple outcomes through the implementation of joint event strategies" (Ziakas, 2013a, p. 14). The portfolio approach offers synergies among events

and stakeholders within the destination to optimally utilise resources (Getz, 2005, 2008; Ziakas, 2014b; Ziakas & Costa, 2011a). Some authors have used organisational ecology to understand how to use an event portfolio or the similar concept of event population (Andersson & Lundberg, 2013; Getz & Andersson, 2016). This approach suggests that how other events within the portfolio impact the viability of a single event, and how a sustainable portfolio of events can be maintained and measured should be key considerations.

The mix of events in the portfolio should reflect diversity in type, size and season, thereby reaching various target audiences in the event market (Ziakas, 2014b). By selecting events for a portfolio that are unique to the location and that can be best aligned to broader policy objectives, the propensity for success seems more likely (Smith, 2014; Ziakas, 2014b). Event stakeholders can methodically target, evaluate, and develop events that are best suited to their objectives (Getz, 2008). Ziakas (2014) produced a model to emphasise the interconnected nature of planning, implementing, and leveraging an event portfolio. An event portfolio provides the potential for events to be cross-leveraged with other events in the portfolio (Chalip, 2004; Ziakas, 2014b, 2018). Cross-leveraging is where events can be used to support each other (Ziakas, 2010, 2014b, 2018; Ziakas & Costa, 2011a, 2011b). However, the creation and maintenance of an event portfolio can be a complex and complicated undertaking.

The existing empirical research on event portfolios has detailed problems that cities have faced in the design and implementation of event portfolio strategies, or more accurately, the lack of a strategic focus (Pereira et al., 2015; Ziakas, 2010). These challenges in designing and implementing event portfolios include inadequate planning and implementation of event objectives, which compromises the strength of the strategic management of the event (Chalip & Leyns, 2002); the propensity to focus on economic benefits (Pereira et al., 2015); unclear or unshared vision of the strategic goals (Pereira et al., 2015), absence of an overarching strategy, creating misalignment in the strategic direction and the lost potential of developing a truly synergistic event portfolio (Clark & Misener, 2015); and a lack of collaboration and poor coordination (Pereira et al., 2015). Interestingly, all of the research that has examined the use of event portfolios has focused on what has not worked, rather than what has worked. There is a gap in the literature to understand what factors contribute to a destination's ability to successfully leverage an event portfolio.

A two-year ethnographic study in the town of Fort Stockton, Texas, USA focused on nine different events within the community and included both participant observation and interviews with event organisers, event attendees, volunteers, local officials, and business stakeholders with the region (Ziakas, 2010; Ziakas & Costa, 2011b). Three themes emerged within the event portfolio: event relatedness, leveraging opportunities, and event portfolio implementation. Event relatedness referred to the functional interconnectedness of events and included volunteer pools, markets, and

experiential capacity. Individuals volunteered for multiple events, and there was complementarity in target markets across events including tourism markets and local families. In addition, the community shared knowledge and experience of running events within the community, facilitated either by personnel being involved in multiple events or through event replication. Although the events were connected through common objectives and shared resources and the local governmental structure enabled resource sharing and coordination, strategic planning was not utilised and therefore opportunities for cross-leverage were missed. However, while no formal strategy or coordinating entity guided the event portfolio, organic relationships and interrelationships formed (Ziakas, 2010).

While Fort Stockton's event portfolio was not formally organized, the events were interwoven into the social fabric of the local community (Ziakas & Costa, 2011b). The planning and implementation of events relied on "intuitive ad hoc efforts" rather than systematic strategies. The Fort Stockton studies suggest that interrelationships are key to leveraging event portfolios and that a formal policy that creates and manages cooperation among key stakeholders would be useful to achieve planned outcomes (Ziakas, 2010; Ziakas & Costa, 2011b).

In seeking to understand the development of strategic goals and the subsequent implementation relating to an event portfolio, Pereira et al. (2015) studied a nautically themed event portfolio consisting of six events in Algarve, Portugal. The event portfolio was organised by Expo Arade, a municipal entity responsible for promoting tourism and events within the region, working in conjunction with the local information and public relations office. Poorly defined goals, a lack of specific strategies, and a lack of coordination led to the inefficient leveraging of the event portfolio. Further, the study highlighted that economic goals were a clear focus of the strategy and this was consistent with the focus of the official contracts between the destination and the event. However, social goals were not seen to be an evident priority, thus limiting the benefits that could have been leveraged. The authors noted that further empirical work is needed to understand the conditions that can lead to a more successful implementation of an event portfolio strategy.

Examination of a sport event portfolio in London, Ontario, applied Ziakas and Costa (2011a) framework (event relatedness, social and human capital, grounding logic, and authenticity) and identified two additional themes – timing and political grounds (Clark & Misener, 2015). However, little strategy guided the selection of specific events, whether small or large or sport or non-sport. Nevertheless, the successful hosting of events in the city was a primary catalyst for creating the city brand, although this was purely coincidental and not the result of any strategic effort.

When leveraging events and event portfolios, stakeholders must collaborate and work in synergy (Chalip, 2014; Ziakas, 2014b). However, stakeholders often have different goals and competing agendas (Ziakas, 2014b; Ziakas & Costa, 2011a), or may not work effectively together (Weed, 2003). The event portfolio approach requires the development of relationships among events

as well as with the destinations in which they are hosted (Ziakas, 2010). Therefore, how relationships are formed and maintained in managing an event portfolio are important considerations.

2.7.1 **Collaboration**

A collaborative effort takes place "when a group of autonomous stakeholders of a problem domain engage in an interactive process, using shared rules, norms and structures, to act or decide on issues related to that domain" (Wood & Gray, 1991, p. 146). Collaboration is an essential but complex component within stakeholder networks (Saito & Ruhanen, 2017). Several factors have been identified that can impact (positively or negatively) the process of collaboration. These factors include power dynamics, competing or conflicting interests, resource ownership and allocation, joint formulation of objectives and strategies, trust, transparency, and interpersonal relations (Bramwell & Sharman, 1999; Jamal & Getz, 1995; Waayers, Lee, & Newsome, 2012; Waligo, Clarke, & Hawkins, 2013).

According to d'Angella and Go (2009) because of the increasing fragmentation and volatility within the tourism [and event] system, "stakeholders are pressured to adapt collaboration principles to everyday practice, particularly in the planning and marketing areas" (p. 431). However, it is important to note that collaboration does not always occur in a systematic or linear manner (Hall, 1999a). Collaboration, a necessary condition for destination competitiveness, is about "working with partners to leverage existing resources of all kinds to provide maximum strategic benefit" (Hardy, Phillips, & Lawrence, 2003, p. 325). This view of collaboration is akin to the managerial practice of event leverage, in that strategic partnerships are forged to maximise benefits from available resources.

Event leverage requires collaboration between and among stakeholders (Ziakas, 2010, 2014b). Likewise, collaboration is essential when leveraging event portfolios, as the design and implementation of event portfolios work best in a collaborative environment. While these collaborative interactions and relationships are important, it is unclear the extent to which relationships can foster the synergy and environment necessary to promote an event portfolio strategy. Relationships are a key factor in business and have even been shown to provide a competitive advantage (Perrien & Ricard, 1995). Relationship marketing emphasises the building of relations through business exchanges to satisfy the needs of business partners (Sheth, Parvatiyar, & Sinha, 2012). Thus, a relational approach to examining event leverage is a feasible strategy (Parvatiyar & Sheth, 2000; Perrien, Filiatrault, & Ricard, 1993).

Ziakas (2014b) describes the process of developing leveraging strategies as a consultative one, that should be driven by analysis, weighing costs and benefits and selecting outcomes that are the best fit for the event and the city (Chalip, 2014; Ziakas, 2014b). The specific leverage strategies that are utilised will be decided on by the stakeholders vested with the responsibility for devising the

strategies – strategies that are workable given the host city's context and objectives. However, the process of developing leveraging strategies may not be as straightforward as it appears on the surface. According to the findings of a research by Kennelly et al. (2017) that sought to examine the leveraging efforts of universities in the Glasgow region around the 2014 Commonwealth Games, "a lack of understanding of leveraging strategies was at the core of missed opportunities" (p. 833). While the majority of research on event leverage focuses on assessing outcomes, there is a paucity of research on the process for achieving event outcomes and the decisions behind setting the leverage objectives (Chien et al., 2017; Potwarka & Snelgrove, 2017; Ziakas, 2014b); this is even more so in the context of event portfolios.

Therefore, this suggests that a better understanding of the development and implementation of leveraging strategies is likely to improve the results from those initiatives. The findings of the Kennelly et al. (2017) study allowed the authors to outline key principles to facilitate effective leveraging. These key principles include: early engagement with stakeholders, senior leadership stewarding the leveraging process, adequate resourcing of leveraging efforts, establish and streamline protocol for communication and engagement practices, and a coherent strategic vision (Kennelly et al., 2017). In addition to identifying the desired outcomes, risk identification and mitigation tactics were also mentioned as being instrumental in increasing the success of the leveraging effort. Furthermore, developing leveraging strategies ideally requires a cross-functional team (O'Brien & Gardiner, 2006). In addition to being cross-functional, the team is typically cross-institutional, as the members of the team are usually "recruited" from various government agencies, not-for-profits, industry representative groups, and various private organisations (Kennelly et al., 2017). Having a cross-functional and cross-institutional team is optimal to provide the breadth of expertise, knowledge and skill across a range of areas necessary for the implementation and effective leveraging of the event. However, the management structures required to steer a leveraging strategy has been given little attention in the academic literature (Cornelissen et al., 2011b; Davidson & McNeill, 2012).

Ziakas (2014b) identifies this factor as institutional structures, and notes that they impact event portfolio planning and leveraging. He describes this element as "the formal organizational framework where events are planned, implemented and leveraged" (Ziakas, 2014b, p. 336). However, there is very little information in the literature regarding the organisational framework that would support the management issues around leverage. Nonetheless, a few authors have suggested that the activities pertaining to event leverage should be undertaken by an entity that is separate from the event delivery entity (Chalip & Leyns, 2002; Misener, 2015). Although oversight for leverage is unclear, it is evident that leverage is a multi-stakeholder endeavour.

Hosting events requires the active participation of several stakeholder groups. This participation, especially in light of a leveraging strategy, requires coordination among the varied

stakeholders and organisations (Chalip, 2000; Misener, 2015; Smith, 2009; Stokes, 2006). However, the coordination of stakeholders can be problematic, not just logistically, but also managerially, as each stakeholder comes with certain antecedents that often mean there are competing agendas. Chalip (2000) suggests that one of the challenges to a leveraging strategy is the coordination that is required given the number of stakeholders that are involved in the process. This, he contends, could explain why no other host city had undertaken a leveraging approach quite as comprehensive and ambitious as Sydney, before the 2000 Olympic Games. However, destination marketers, governments, and civic boosters have sought to leverage subsequent editions of the Olympic Games, with varying degrees of success (or failure). The salient point here is that the coordination of stakeholders is paramount to developing successful leveraging initiatives (Smith, 2009).

2.7.2 **Relationship Marketing**

Strategy-oriented motivations, such as collaborations, usually involve the formation of relationships (Henderson, 2001; King, 2002; Saxena, 2005). The nature of event hosting requires the involvement of multiple stakeholders. Therefore, any event leverage strategy will involve several key stakeholders. One such key relationship is between the officials of Destination Marketing Organisations (DMOs) and events. DMOs are often one of the most influential stakeholders within the tourism industry (Gretzel, Fesenmaier, Formica, & O'Leary, 2006; Prideaux & Cooper, 2003; Volgger & Pechlaner, 2014). According to Timur and Getz (2008), DMOs have one of the most critical roles in attaining stakeholder collaboration because other actors within the tourism industry trust or depend on them. Given the position of DMOs as a key and influential stakeholder, as well as their access to or possession of key resources, DMOs are perceived to hold the greatest legitimacy and power over other stakeholders within the destination.

Although DMOs possess significant power, they are unable to undertake leveraging without the support and involvement of other key stakeholders such as event owners, event organisers, elected officials, local businesses, and residents. Thus, relationships are necessary to host events and market destinations. Relationship marketing aims to enhance the value for the parties involved, thereby increasing marketing productivity and ultimately profitability for all parties that are engaged in a collaborative business relationship (Berry, 1983; Gronroos, 1990; McKenna, 1991; Parvatiyar & Sheth, 2000). Relationship marketing is "the ongoing process of engaging in cooperative and collaborative activities and programs with immediate and end-user customers to create or enhance mutual economic value at reduced cost" (Parvatiyar and Sheth (2000, p. 9). This conceptualisation of relationship marketing highlights the importance of collaborative relationships that lead to the creation or enhancement of economic value.

Parvatiyar and Sheth (2000) propose a four-stage process model of relationship marketing that emphasises the process involved in forging collaborative relationships. The four stages include formation, management and governance, performance evaluation, and evolution. O'Brien and Gardiner (2006) have previously used this model to understand how non-host cities leverage pre-Games training for the Olympic Games. The four stages of the relationship marketing model are explained below.

2.7.2.1   *Formation.*

The formation stage refers to decision making that must occur to engage specific individuals in a cooperative and collaborative partnership for a specific purpose (Parvatiyar & Sheth, 2000). The formation stage includes defining the purpose and objectives of engagement, selecting relevant partners to be involved, and developing strategies or programs to drive the direction of the group and enhance partner engagement. Also included are decisions about who is involved in the process and how relevant stakeholders will be involved to maximise engagement opportunities (Parvatiyar & Sheth, 2000). Event portfolios are often designed to achieve tourism objectives for the destination. Partners are then selected from the destination to form the governance committee for overseeing the construction of an event portfolio. For example, O'Brien and Gardiner (2006) viewed the formation phase in terms of understanding exchanges among key stakeholders from sport, tourism, and government who were involved in pre-Games training for the Olympics. Research on event portfolios highlights the importance of collaboration (Chalip, 2014, 2017; Ziakas, 2014b).

2.7.2.2   *Management and governance process.*

The management and governance phase includes role specification, communication, planning, operating processes, human resources, and the development of monitoring systems – all designed to keep relationships on track and foster progress toward the group's goals. Establishing an event portfolio requires a diverse network of stakeholders who may have competing agendas, making coordination of stakeholders necessary. Diversity may be evident in the genre of events, the objectives of individual event organisers, and the tourism and business stakeholders involved in the event portfolio (Carlsen, Ali-Knight, & Robertson, 2007; Hede, 2008; O'Brien, 2006). However, the purpose of the event portfolio is to maximise the use of resources through synergies and collaborations. As events included in a destination's event portfolio should strategically and purposefully benefit the destination (Chalip, 2017; Ziakas, 2013a), the destination should assess what each event contributes to the destination. In addition, appropriate structures should be put in place to facilitate networking opportunities to encourage collaboration and potentially enduring relationships among stakeholders (Chalip, 2004; Chalip & Leyns, 2002; O'Brien & Gardiner, 2006). Thus, networking and relationship development should be treated as a key component of management and governance.

2.7.2.3   Performance evaluation.

Performance evaluation involves periodic assessment of the outcomes of the relationship marketing activities (Kennerley & Neely, 2003; Kennerley, Neely, & Adams, 2003). The evaluation of actual performance against planned outcomes is an essential feature of an appraisal system. Program appraisals should assess whether objectives are being met and used to inform decisions about continuation, modification, or termination of the relationship marketing programs (Parvatiyar & Sheth, 2000). Since event portfolios are intended to maximise benefits of events to the destination by sharing resources and cross-leveraging (Ziakas, 2010), events, and the combination or composition of events within the event portfolio, should be frequently assessed against the destination's objectives. Relationships among events should be evaluated and strategic action or intervention should then ensure maximisation of the relationship marketing program.

2.7.2.4   Evolution.

Relationship marketing programs are likely to evolve over time (Bedeian & Zammuto, 1991), either through pre-planning or natural occurrence. The relationship's ability to meet objectives is likely to influence stakeholder satisfaction and affect the evolution of the relationship marketing program. When performance is satisfactory, the parties are more likely to be motivated to continue or enhance the relationship marketing program. When performance is below expectations, parties may contemplate termination or modification of the relationship. Importantly, strategies to ensure the continued sustainability of mutually beneficial relationships may be key to achieving long-term objectives (Ahmed, Patterson, & Styles, 1999). Parvatiyar and Sheth's (2000) four-stage process model of relationship marketing is used to understand the role of relationships in the formation and maintenance of an event portfolio. Thus extending O'Brien and Gardiner's (2006) application of this model to understanding leveraging of a single event. Therefore, this enquiry forms the basis of the third research objective.

Research objective 3: To understand how relationships can facilitate the creation and maintenance of an event portfolio.

In summary, given the prominent/central use of events to achieve destination objectives, it is necessary for us to broaden our knowledge of events, specifically, how to leverage the desired benefits from events. As events continue to occupy an important position in advancing growth and development agendas, our understanding of how to better leverage events will become even more critical. Therefore, this pursuit to understand how event leverage can influence various stakeholders within a destination, underpins the formulation of the research objectives. The three specific research objectives that guided this PhD thesis were:

Research objective 1: To examine how formalised regulations of event rights owners impact how a host community can leverage an event.

Research objective 2: To explore the applicability of tourism leveraging strategies devised for mega-events on small-scale events.

Research objective 3: To understand how relationships can facilitate the creation and maintenance of an event portfolio.

The research objectives are valid as they seek to gain deeper insights into the phenomenon of event leverage by exploring other perspectives. These perspectives are from host destinations that have formalised agreements with event rights owners; small-scale event managers; and a regional tourism destination utilising an event portfolio strategy. Specifically, by including these stakeholders – stakeholders that were not considered in any significant way in previous studies- we were able to understand the impacts that are likely to affect these stakeholders. Further, we understand how these impacts could influence the outcome of the event leverage strategy. Significantly, by exploring an understanding how event leverage strategies can impact these stakeholders, it is hoped that better strategies are designed. Strategies that are collaborative, and fair, where there is an ethos that host destinations benefit proportionately from any event leverage strategy. This approach seems justifiable, particularly as tourism is an interdependent system, thus involving multiple stakeholders. Therefore, it would be more meaningful for stakeholders to work cooperatively to develop benefits that are shared among key stakeholders.

This thesis sought to advance the body of work on event leverage in understanding how and why certain strategies either help or hinder the generation of positive benefits for key stakeholders. Having greater focus on the strategy rather than on the event itself, is a significant departure from previous research. Additionally, there is limited empirical study about the development and implementation of leveraging strategies or leveraging objectives. Furthermore, it was unclear the effect a leveraging strategy would have on a small-scale event. Finally, there was a lack of understanding about the efficacy of relationships in forging and maintaining an event portfolio strategy.

The next section outlines the methodology that informed the research design and guided the research process.

2.8 OVERVIEW OF PAPERS

Below is a graphical overview of the research gaps and the three research papers that have been produced to address the associated gaps in the literature.

RESEARCH GAP 1:
Formalisation of event rights owners' rules and regulations and impact on how a host community can leverage an event

- **PAPER 1**
- **Title**: It was never ours: Formalised event hosting rights and leverage
- **Journal:** Tourism Management (A*)
- **Research Method:** 19 Qualitative- Face-to-Face Interviews
- **Participants:** Key tourism stakeholders and former members of local organising committees for Barbardos and Jamaica
- **Case Study Setting:** The Caribbean Islands of Barbados and Jamaica, co-hosts of the 2007 ICC Cricket World Cup

- **PUBLISHED**

RESEARCH GAP 2:
Impact **of e**vent leveraging strategies on small-scale events; event owners perspective

- **PAPER 2**
- **Title:** What about the event? How do tourism leveraging strategies affect small-scale events?
- **Journal:** Tourism Management (A*)
- **Research Method:** 8 Qualitative- Face-to-Face Interviews
- **Participants:** Owners of small-scale/regional events
- **Case Study Setting:** Queensland, Australia

- **PUBLISHED**

RESEARCH GAP 3:
The role of relationships in creating and maintaining an event portfolio

- **PAPER 3**
- **Title:** The utility of relationships in the creation and maintenance of an event portfolio
- **Journal:** Marketing Intelligence & Planning (A)
- **Research Method:** 9 Qualitative- Face-to-Face Interviews
- **Participants:** Key tourism stakeholders
- **Case Study Setting:** Queensland, Australia

- **PUBLISHED**

Figure 3: Identified Research Gaps and Corresponding Research Papers

2.9 METHODOLOGY

2.9.1 Thesis Entirely Comprised of Publications

The University of Queensland (UQ) has several formats from which a candidate can choose to present "the material outcomes from candidature" (Graduate School, 2015). The *essay* format was chosen for this thesis, as it allowed "wider and earlier dissemination of research results" (Leopkey, 2013, p. 36) and provides useful training for candidates in becoming adept with the skill set needed to write and publish in peer reviewed journals. To this end, three papers were produced and each paper addressed a key research gap.

The UQ Business School uses the Australian Business Deans Council (ABDC) Journal Quality List to assess journal ranking. The three papers have been published in peer-reviewed journals that are highly-ranked on the ABDC Journal List (see Figure 3). Paper One entitled, *It was never ours: Formalised event hosting rights and leverage* was published in *Tourism Management*, an A* journal; Paper Two was titled, *What about the event? How do tourism leveraging strategies affect small-scale events?* was published in *Tourism Management*, an A* journal; finally, Paper Three was published in the A-ranked journal, *Marketing Intelligence & Planning* and was entitled, *The utility of relationships in the creation and maintenance of an event portfolio*. Ultimately, the choice in selecting the targeted journals was based on the concepts and problems that were investigated, and the focus of the specific journal. That is, how well the scope and aims of the journal fit with the research focus of the paper.

The following section outlines the philosophical underpinning governing this thesis, the methodology, and research design that were deemed appropriate to successfully investigate the phenomenon of event leverage and its impact on stakeholders.

2.9.2 Philosophical Underpinning

According to Creswell (2013), philosophical assumptions are our beliefs. These broad assumptions or philosophical views allow us to produce abstract ideas that inform research and dictate the research design. Four main philosophical assumptions are: **ontological** - the nature of how things exist in the environment we are investigating; **epistemological** - seeks to determine what qualifies as knowledge and how these claims of knowledge are justified; and examines origin, nature, methods and limits of knowledge; **axiological** - based on value system and ethics; and **methodological** - the process of the research; investigating a process and the rules and principles that govern or regulate its practice (Creswell, 2013).

Philosophical assumptions are important as they influence the way in which a problem is viewed, the subsequent development of research questions or research focus, and how the

investigation proceeds. A theoretical perspective is defined as "an approach to understanding and explaining society and the human world, and grounds a set of assumptions that […] researchers typically bring to their methodology of choice" (Crotty, 1998, p. 3). Examples of theoretical perspectives include positivism, postpositivism, interpretivism or social constructivism, pragmatism, feminism, racialised discourse, cultural studies models and post colonialism (Creswell, 2013; Denzin & Lincoln, 2008). Based on the nature of this research, the philosophical assumption, that is the ontology, will be embedded within the social constructivism interpretive framework. A synopsis of my philosophy is provided as a justification of the selected methodology and the specific methods used in this thesis to understand the strategic use of event leverage in host destinations.

Ontology is defined as the study of being and is concerned with the nature of how things exist (Crotty, 1998). An ontological relativity is based on the premise that each individual holds a particular worldview – all tenable statements depend on this worldview; no worldview is seen as "uniquely determined by empirical or sense data about the world" (Patton, 2015, p. 122). The interpretive or theoretical framework provides the lens through which the researcher will view and investigate the research problem. Social constructivism defines the nature of reality in the view of the participant, whereby "multiple realities are constructed through our lived experiences and interactions with others" (Creswell, 2013, p. 36).

An interpretive framework based on social constructivism was considered more appropriate to investigate the overarching research objective of understanding the influence of event leverage on different stakeholders within a host destination, which was the focus of this thesis. Social constructivism seeks to understand the phenomenon under investigation by relying on the experience or perspective of the participant. By adding the social constructivism framework to the ontological assumption, the following were achieved: multiple views were considered, as opposed to the positivism framework where there is a single reality, which is evidence-based and mathematically verified. With social constructivism – a post-positivism outlook – the perspective and conclusion of the participants were formed or constructed by their historical and cultural norms; it enabled the development of a grounded theory perspective which grounded the views or perspectives of the participants (Charmaz, 2006; Creswell, 2013).

This could not have been successfully accomplished using other interpretive frameworks, as the aim was to provide insight into the complex phenomenon of event leverage from the perspective of stakeholders that have received limited attention in the literature. In doing so it is the participants' perspective, without the influence of the researcher that is of paramount importance. For example, positivism takes more of a scientific approach, which is a strict cause and effect

belief, to investigating a research problem (Creswell, 2013). This positivism approach was therefore not appropriate for the research focus of this thesis.

A research methodology (procedure) is "the strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes" (Crotty, 1998, p. 3). A range of research methodologies are available. Research methodologies or strategies include ethnographies, case studies, phenomenology, and grounded theory. The literature on event leverage is in a developing stage and as such there are many areas of the phenomenon that requires investigation. By completing my thesis utilising the essay format, I was able to examine different stakeholders to gain insight into particular issues. This also enabled me to utilise different and appropriate research methodologies to suit the research objective being investigated. As a result, a grounded theory methodology was employed for essays one and two, while a case study methodology was utilised for essay three.

As there is limited information about the impact of leveraging strategies on small-scale events and host destinations staging a major event, the grounded theory approach was used to allow for the development of theories from the data to explain how leveraging impacted these events and the stakeholders. Case studies are both descriptive and explanatory and are often used as a practical research tool to understand complex phenomena. It allows for the investigation of contemporary problems within the real-life context, thus providing useful insights (Scholz & Tietje, 2002).

2.9.3 Research Design

Based on the research gaps identified, this research followed a qualitative approach. Qualitative research was appropriate for the study that was undertaken, as it enabled the exploration of concepts that cannot be easily measured as in a quantitative study (Creswell, 2013). Qualitative research is ideal for providing "rich in-depth knowledge from multiple viewpoints" (Jennings, 2012, p. 309). Additionally, this research approach proved useful as the data collected did not generally "lend itself to statistical analysis and conclusions are not based on such analysis" (Veal, 2006, p. 98). Qualitative research allows for complex reasoning that uses both inductive and deductive logic (Creswell, 2013). By using inductive reasoning, specific cases will be used to generate general principles about a phenomenon (Elmes, Kantowitz, & Roediger, 2006; Gardiner & Chalip, 2006). Thereby building "patterns, categories and themes from the 'bottom-up', by organising the data inductively into increasingly more abstract units of information" (Creswell, 2013, p. 45).

Furthermore, the qualitative approach was deemed particularly useful because the research areas represented questions that were not fully understood and so exploring these notions from multiple perspectives produced a broader understanding. This approach also allowed the influence of social, historical, political and other contexts to be considered as partial explanation.

The following provides a synopsis of the three research contexts, the related methods used, and the techniques employed to collect and analyse the data.

2.9.4 Research context, data collection and analysis

2.9.4.1 Paper 1- *It was never ours: Formalised event hosting rights and leverage*

The objective of this study was to examine how formalised regulations of event rights owners impact how a host community can leverage an event. Three primary reasons motivated the decision to conduct the study. First, the event leverage phenomenon has been predominantly researched by using mega-events, specifically the Olympic Games and to a lesser extent the FIFA Football World Cup. Therefore, it was of interest to understand how event leverage has been used in conjunction with a major event. Further, since there is limited information on leveraging cricket events, it was believed that there was significant value in examining the issue by looking at a major cricket event, Cricket World Cup (CWC). The CWC is owned by the International Cricket Council (ICC), the event rights holder. The 2007 edition of the event was selected as the event of focus for the research as it offered the opportunity to review the legacy of the event, 10 years post-event and how the event was leveraged.

In 1998, keeping with its rotational system, the ICC awarded hosting rights to the West Indies Cricket Board (WICB) for the 2007 ICC CWC (Horne, 2010). The WICB is the governing body for cricket in the West Indies. In order to deliver the mega-event, the WICB incorporated a wholly owned subsidiary, ICC Cricket World Cup West Indies 2007 Inc. In May 2017 the WICB was renamed and rebranded as Cricket West Indies (CWI) (Cricket West Indies, 2017). After a competitive bid process, nine countries were selected to co-host the event. This co-hosting arrangement across multiple island-states was necessary given the size of the islands. No one island had the capacity, human and otherwise, to deliver the entire event. Figure 4 below shows a map of the Caribbean and the host countries: Antigua and Barbuda, Barbados, Grenada, Guyana, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago. The West Indies, also referred to as the Caribbean, is a crescent-shaped archipelago that separates the Gulf of Mexico and the Caribbean Sea to the west and south respectively, from the Atlantic Ocean to the east and north. The chain of islands stretches from the peninsula of Florida south eastward to the north coast of Venezuela (see Figure 4).

In the West Indies, specifically the English-speaking Caribbean, the sport of cricket was introduced by the white planter class to the slave population who worked on the numerous sugarcane plantations. This marks the genesis of the ties between cricket and the Caribbean. Caribbean cricket is more than merely sport (Beckles, 2004). Cricket in the Caribbean is believed to

reflect "both the region's colonial history and its post-colonial aspirations" (Horne, 2010, p. 1555). This mix made the sport more of a political institution as it symbolised the best of the Caribbean people, but more importantly, triumph over an oppressive system (Horne, 2010).

Figure 4: Map of the Caribbean showing the 2007 Cricket World Cup Host Countries

West Indian cricket has become renowned for both the unique and flamboyant style of play by its cricketers and the West Indian fans (nationals) who are known for their flair with "banners, drums and improvised percussion" producing a masquerade atmosphere (Crabbe & Wagg, 2000, p. 71). The Caribbean culture has been long associated with carnival and a general feel good island-spirit, which carries over into many aspects of daily life and leisure activities. This spirit of carnival was also infused into the sport of cricket, producing an unmistakeable Caribbean quality adding to the region's cultural tapestry. Culture, in both its tangible and intangible forms, has become an important element in the marketing of destinations, particularly the "growing importance of cultural and service markets in the experience economy" (Horne, 2010, p. 1550; Pine & Gilmore, 1999) and the growth of "experiential commodities" (Lee, 1993, p. 135), which includes cultural events. In fact cultural major-events such as the European Capital of Culture, are increasingly being used to attract visitors to cities and to showcase and celebrate the unique cultural characteristics of the place (Santos, Vareiro, Remoaldo, & Ribeiro, 2016). It is not surprising therefore, that cultural elements are also in included in other event genres, such as large-scale sporting events. These cultural elements include food, music, dance, art and cultural expressions (Getz, 2008).

A significant component of the Caribbean's appeal as a tourist destination is the culture of its people (Albuquerque & McElroy, 1992; Butler, 1993; Plog, 2001). Indeed, the promotion of this culture is highly visible in the marketing efforts and messaging from the tourism marketing

agencies representing the respective Caribbean islands. Therefore, it was widely and openly expected that the hosting of the 2007 ICC CWC, was more than delivering a large-scale international sport event. The culture of the Caribbean and specifically its cricket culture was expected to form a large part of the event product. There were seven objectives for hosting the 2007 ICC CWC, one of which was "unique Caribbean promotion- to promote a unified Caribbean as a premier destination for all the world's nationalities" (ICC Cricket World Cup West Indies 2007 Inc., 2004, p. 2). The CWC was therefore a vehicle for the promotion of the Caribbean as a unique destination, with cricket contributing to this uniqueness.

As the Caribbean region prepared to host the cricket mega-event for the first time, expectations were high – not only for the anticipated economic benefits, but also the pride and euphoria that surrounded the sport and the culture (Jordan, 2011; Lorde et al., 2011; Tyson et al., 2005). The gains to be realised from the event included increased business/investment opportunities, increased visibility, multi-million dollar infrastructural development and positive growth in visitor arrival numbers (Lorde et al., 2011; Sinclair-Maragh, 2011). After a competitive bid process, nine countries were selected to co-host the event. This co-hosting arrangement across multiple island-states was necessary given the size of the islands. No one island had the capacity, human and otherwise, to deliver the entire event. Figure 4 above shows a map of the Caribbean and the host countries: Antigua and Barbuda, Barbados, Grenada, Guyana, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago.

The 2007 ICC CWC event was heavily reported in the media and through government documents and reports, as a catalyst for development in the Caribbean region and was expected to produce a lasting positive legacy (Bhagoo & Rambarran, 2006; Jordan, 2011; Majumdar, 2009; Sinclair-Maragh, 2011; Tyson et al., 2005). In preparation for the event, significant investments were made by all nine host countries. However, Jamaica and Barbados allocated the largest amount of funds to host the event, with significant portions of their respective national budgets earmarked for the mega-event project. The Government of Barbados allocated US$200 million of its budget to host the event, while the Government of Jamaica allocated US$105 million of taxpayers' money to host the 2007 ICC CWC (Bhagoo & Rambarran, 2006). The significant investment was an indicator of the importance of the event to the region and the role of the event in acting as a catalyst for development.

In-depth face-to-face interview was deemed the most suitable method to collect the data to examine the impact of event rights ownership in respect to a host destination's ability to leverage benefits. Nineteen face-to-face in-depth interviews were completed with key tourism stakeholders and former members of the 2007 ICC CWC local organising committees (LOCs) for Barbados and Jamaica (see Table 1). Purposive and snowballing techniques were used to select respondents who

held key roles in delivering the event or who currently hold key decision-making roles within the tourism sector (Mason, 2002; Patton, 2002a). Nine of the participants were from Barbados and the other 10 participants were from Jamaica. A characteristic of qualitative samples is that sample sizes are relatively small (Ritchie, Lewis, Elam, Tennant, & Rahim, 2014). The small size allows in-depth exploration of the focal phenomenon with key stakeholders. (Ritchie et al., 2014).

In-depth interviews are a meaningful tool for gathering the perspectives of respondents (Rubin & Rubin, 2012). Semi-structured interview questions were developed to guide the interviews (Flick, 2015; Yeo et al., 2014). Semi-structured interview questions allow both structure as well as flexibility. Having structured questions allows the researcher to guide the interview and focus on the research question. However, this type of interview also allows the researcher to probe the respondent, when necessary, to delve deeper into understanding their responses. The interview questions included: "What is your assessment of how the event was leveraged?"; "What were some of the barriers/challenges to leveraging the event"; "How did the ICC regulations impact the leveraging of the event?"; and "Do you believe Barbados/Jamaica benefitted from the event?"

The interviews ranged from 45-120 minutes in duration, were recorded digitally, and transcribed verbatim. To preserve the anonymity of participants, a five character alpha-numeric identifier by country was used. For example, the fourth participant interviewed in Barbados is identified as 04BRB, and the second participant interviewed in Jamaica is identified as 02JAM.

Each author individually read the transcripts multiple times, to become familiar with the data. During that period of independent work, they developed the initial grounded open codes (Corbin & Strauss, 2008; Creswell, 2013). The authors then convened to discuss their individual results and deliberated over several rounds until there was agreement on themes and theme labels. When differences arose, the authors referred to the raw data to arrive at a resolution. The authors then used the open codes and knowledge of the event leverage and formalisation literatures to cluster the data into various themes. These steps were taken to ensure the analysis of the data could stand up to scrutiny, serving to enhance the trustworthiness of the study (Lincoln & Guba, 1986). A grounded theory model developed (see Figure 1, p. 58) from the analysis, shows how the formalisation of the event rights owner influences host destinations' ability to leverage events.

2.9.4.2 Paper 2 - *What about the event? How do tourism leveraging strategies affect small-scale events?*

Based on the gaps identified in the literature, the perspective of small-scale event managers/owners, as it relates to the context of event leverage, has not been given much attention in the extant literature. Therefore, it was seen as an imperative to include the perspective of this key stakeholder to provide a broader understanding of the impact of event leverage. Given the location of

the research team, the ability to identify a suitable 'eventful' destination known to be utilising an event leverage strategy, a tourist destination on the east coast of Australia was identified (to protect the anonymity of participants, no further identification of the destination is possible).

The Australian destination was identified through online government/tourism reports as utilising an event leverage strategy to drive tourism business to its region. A leveraging activity can take varying forms, and is a function of the desired objectives to be achieved and the decision made by tourism/destination stakeholders who are initiating the leveraging process. In this case, grant funding was being used to leverage events within the destination; in fact, grant funding was a policy and programme (directive) of the state tourism organisation (STO) to encourage increased visitation to the destination.

Therefore, since grant funding was the policy and programme being used by the STO and its agencies, it was logical to use grant funding as the criteria for the selection of events. Regional (small-scale) events were identified by reviewing the calendar of events for the region, and then events' websites were cross-checked. Events' websites that displayed the logo of the destination marketing organisation (DMO) were deemed to be supported through the leveraging activity, which was a grant funding programme. After the shortlisting process to select the events, the event manager/owner of each shortlisted small-scale event was contacted via email. This introductory email provided brief information about the project, the researcher, and sought to determine their willingness to participate. Once their willingness to participate was established, another email was sent with greater details and the relevant forms for completion: informed consent, project information forms (see Appendix). Thereafter, arrangements were made for the interview date, time and location. The researcher temporarily stayed in the destination for the one-week duration of the data collection. Face-to face interviews were conducted at the office of the participants, with the exception of one interview. At the suggestion of the participant and due to office renovations, one interview was conducted at a local restaurant a short distance from the participant's office. Following interviewing protocol (Yeo et al., 2014), making the interviewee comfortable with the interviewing process is key and using a space, such as their usual office location, is a means of providing this familiarity and comfort. The duration of the interviews ranged from 50 to 90 minutes, and each interview was digitally recorded and transcribed verbatim for the data analysis process.

As little is known about the impact of tourism leveraging strategies on small-scale events, a qualitative method was used. A qualitative method is appropriate as there are no preconceived notions (Miles & Huberman, 1994) of how tourism leveraging affects small-scale events. To understand the impact of event leveraging strategies on small-scale events, face-to-face in-depth interviews were conducted with eight event managers across seven events. Purposive sampling was used to select respondents (Mason, 2002; Patton, 2002a). All of the events were located within the

same geographic region in Australia, and received funding from a tourism organisation that was specifically for tourism generation around events. The specific grants provided by the state DMO are available to events that occur within regional areas within the state. The criteria for the grants are based on tourism objectives. Events are also able to access grants from the local council; however, the criteria for council grants are based on showcasing or building capital within the local community, rather than generating tourism. The grants from the tourism organisation are awarded on the basis of a competitive application process and have strict directives as to how the funds can be spent. The events included one arts and cultural event, one food festival, two music festivals, and three sport events. The event managers from each event were identified and contacted to determine their willingness to share their experiences around leveraging their events for tourism gain.

In-depth interviews are a powerful means to comprehend the viewpoints of respondents (Rubin & Rubin, 2012). To understand the impact of tourism leveraging strategies on small-scale events, semi-structured interview questions were developed to guide the interviews (Yeo et al., 2014; Yin, 2014). These items included "Please describe how your event is leveraged for tourism gain," "How does your event benefit the region's tourism?" and "How have tourism leveraging strategies influenced or impacted your event?" The items provided the opportunity to probe and explicate the subject under investigation (Neuman, 2012; Yeo et al., 2014). The interviews ranged from 50–90 minutes, and each interview was digitally recorded and transcribed verbatim. Small sample sizes are appropriate in qualitative research (Bryman, 2012; Creswell, 2013; Patton, 2002a; Ritchie et al., 2014). While there are no strict rules for sample size in qualitative inquiry (Patton, 2002b), the seven events represent events within a particular destination that received tourism grant funding through a particular initiative of a tourism organisation. Further, the sample size is consistent with McCracken (1988) who suggests that eight interviews are sufficient for the generation of themes and categories in qualitative research. Data saturation was reached as no new information was gained in the last interview.

Data analysis

An inductive process was used to identify themes (Glaser & Strauss, 1967). On completion of the data collection the two authors read the transcripts several times to become familiar with the data. Data were coded independently by each author to enhance reliability and then the authors conferred to refine the themes (Miles & Huberman, 1994). Consistent with the process of constant comparison, thematic coding was used to develop concepts and themes from the interview data through a process of open, axial, and selective coding (Corbin & Strauss, 2008). Open coding was used to identify overarching themes relating to the impact of leveraging strategies on small-scale events, thus allowing the authors to focus on the core phenomenon. Axial coding then followed,

relating concepts/categories to each other by exploring causal conditions, identifying the context and intervening conditions, and delineating the consequences (Corbin & Strauss, 2008; Creswell, 2013). Selective coding further refined the relationships and interrelationships among the codes.

The authors conferred until there was mutual agreeance on themes and theme names. The authors referred to the raw data when disagreements occurred. To illustrate the coding process, one author developed a theme titled *grant funding as a diversion for event managers*. The other author developed a similar code titled *restrictions on grant funding excludes core activities*. When both authors convened to discuss the results, it was decided that this theme could best be described as *restrictions on funding as a diversion from core business*. The logic behind the coding example is further elaborated (see Fig. 1, p. 87). The results were used to develop a grounded theory model of how small-scale events are affected by tourism leveraging. The grounded theory model is presented in Figure 2, p. 88.

2.9.4.3 Paper 3- *The utility of relationships in the creation and maintenance of an event portfolio*

To examine the role of relationships in the formation and maintenance of event portfolios an exploratory case study method was used (Yin, 2009). A single case study is useful as it allows a thorough description of the phenomenon under study, which provides insight into causal factors (Eisenhardt & Graebner, 2007). The single case study took place in one region in Australia. Face-to-face interviews were conducted with nine stakeholders who were involved in the formation, management and maintenance of the region's event portfolio. Semi-structured questions guided the interviews (Yeo et al., 2014). Examples of the interview questions include "What role do events play in meeting the tourism objectives of the destination?", How are events used to meet your organisation's goals?", "Can you give some examples of successful leveraging or cross-leveraging?", and "What has made those relationships successful?" Interviews ranged from 70 - 100 minutes and were digitally recorded and transcribed verbatim.

To enhance reliability, both authors read the transcripts several times and worked independently to determine the initial open codes (Strauss & Corbin, 1990). The authors then discussed and refined the themes to reach agreement (Miles & Huberman, 1994). As the coding strongly resembled a relationship marketing framework, the authors recoded the data according to Parvatiyar and Sheth's (2000) relationship marketing model: formation, management and governance, performance evaluation, and evolution.

2.10 Quality of Research (Trustworthiness)

To gain approval and legitimacy, research must be credible. The pillars of validity and reliability uphold this credibility. Depending on the school of thought research quality is denoted by

different names such as trustworthiness, authenticity, and reliability. Nevertheless, whatever name is appended, trustworthiness is an integral component in a research study. Patton (2015) has acknowledged this shift in the terminology, to use the terms *trustworthiness* and *authenticity* in considering research quality.

Researchers should aim for balance, fairness and neutrality (Patton, 2012a). Patton (2015) further posits that the factor of trustworthiness in research is cultivated through prolonged engagement with data collection and acute attention to pertinent data gathered. Therefore, the credibility of research process and findings can be undermined by a lack of trustworthiness. Lincoln and Guba (1986) argue that four distinct factors are notable when considering trustworthiness: credibility, transferability, dependability and confirmability.

The studies have followed the rigorous research process to ensure the procedures and results are trustworthy. The development of the research questions, the selection of key participants who would be knowledgeable about the topic, the development of interview guides and other activities in the research process ensured that the results were credible. The process used here can be used by other researchers to carryout similar investigation. The methodology presented in each paper will attest to the trustworthiness of the research project.

2.11 Ethical Considerations

The three studies did not pose any risk beyond those expected in daily existence and did not involve vulnerable groups. The UQ Business School Ethical Application Form specifies Indigenous Australians as a vulnerable group. It was unlikely that my interviews would involve members of the Aboriginal community, based on the locations of the study and having prior knowledge of the identity of the participants. For example, it would be unlikely to find an Indigenous Australian in Jamaica. There were no ethical issues associated with the studies. Ethical approval was received on October 15, 2015 and covered all research undertaken during my candidature for purpose of completing my Thesis. The studies adhered to the guidelines as set out by the University of Queensland, specifically those of the UQ Business School and contained in the document titled *The UQ Business School Guidelines for Ethical Review of Research Involving Humans*. The key aspects of the guidelines relate to obtaining permission from the authorised personnel in order to access the population (gatekeeper approval), outlining the procedures for informed consent, ensuring the privacy and confidentiality of the research participants are protected by preserving anonymity and de-identifying the research data, and maintaining the security of research data through the appropriate mechanisms provided by the University of Queensland to store said data. A data management plan was also developed for the research project. Copies of these documents are provided (see Appendix G).

CHAPTER 3 -   PAPER ONE

It was never ours: Formalised event hosting rights and leverage

3.1 Abstract

The awarding of event rights is an integral element of large-scale event hosting. While formalised regulations often act as a coordination mechanism to ensure events are implemented in accordance with strict parameters, how the formalised regulations of event rights owners influence the ability of host cities to leverage and benefit from events is unclear. Through 19 in-depth interviews, this study investigates how formalised regulations of the International Cricket Council (ICC) influenced how two host nations, Barbados and Jamaica, leveraged the 2007 ICC Cricket World Cup. Results revealed that the formalised environment limited the benefits to host countries, but leveraging was still possible. Some stakeholders pushed back against the restrictions to secure targeted benefits from the event. Significantly, these benefits continue to contribute to local economies 10 years after the event. A grounded theory model demonstrates how formalised regulations influence host destinations' efforts to leverage benefits from an event.

Highlights
- Formalised regulations can restrict the ability of host cities to leverage benefits from an event
- Formalised directives locked out local businesses and limited the display of local culture
- Despite control and restrictions imposed by the event rights owner, entrepreneurial local businesses found ways to benefit from the event, through subcontracting
- Event rights owners should consider how their practices help or hinder host destinations to benefit from events

3.2 Introduction

Large-scale events are claimed to bring benefits to cities that host them (Gratton, Shibli, & Coleman, 2005; Huang, Mao, Kim, & Zhang, 2014). However, benefits are best achieved if host cities view the event as "seed capital" (O'Brien, 2006, p. 258), whereby they create a strategic plan to leverage the event in order to achieve targeted strategic objectives (Chalip, 2004). Events can be leveraged for a variety of benefits including social re-engineering (Misener & Mason, 2006; Smith & Fox, 2007), reimaging a host city (Chalkley & Essex, 1999; Shoval, 2002; Smith, 2005), showcasing a nation's culture (Foley, McGillivray, & McPherson, 2012), or acting as a catalyst for infrastructural development (Getz, 1997). Other benefits that are alleged to result from hosting large-scale events include increased employment, business development (Chalip & Leyns, 2002; Sacco & Blessi, 2007; Smith, 2010), urban regeneration (Raco & Tunney, 2010), and development of a destination's cultural or tourism assets (Chalip & Costa, 2005; Foley et al., 2012).

Securing the right to host a large-scale event "is neither easy nor is it risk free" (Andranovich et al., 2001, p. 114). Although large-scale events are often supported by substantial public and private investment, the purported benefits for host communities, including residents and local businesses, have been questioned (Dwyer & Forsyth, 2009; Matheson, 2009a; Pappalepore & Duignan, 2016; Whitson & Macintosh, 1996). Consequently, many cities are shying away from bidding for the opportunity to host large-scale events (Bennett et al., 2013; McGillivray & Turner, 2018; Rundio & Heere, 2016). This reticence is due in part to the increased public scrutiny and pressure from stakeholders to avoid the pitfalls commonly associated with large-scale event hosting (Bennett et al., 2013; Rundio & Heere, 2016; Whitson & Horne, 2006). For example, Boston withdrew its bid to host the 2024 Olympic Games after encountering substantial public opposition from local stakeholders (Lauermann, 2016; Rundio & Heere, 2016).

Large-scale sport events are often owned by governing bodies that grant hosting rights to destinations through highly formalised competitive bid processes (Gold & Gold, 2008; Hiller, 2000d). Essentially a method of organisational control, formalisation refers to "the extent to which policies, procedures, rules and regulations stipulate the ways in which organisational members should act" (Amis & Slack, 2016, p. 314). Generally, larger and more complex organisations have a greater need for more formalised coordination mechanisms. Thus, when a city wins the rights to host a large event, it is subject to strict adherence to the formalised parameters articulated by the event rights owner (Chalkley & Essex, 1999). This practice illustrates the high level of control that event rights owners wield over host communities (Cornelissen, 2007; Rogerson, 2009; Van Wyk, 2008).

Interestingly, Rogerson (2009) claimed the stringency of overly formalised rules can reduce the potential benefits destinations can realise from event hosting. Thus, while events may benefit host communities by showcasing culture (Chalip, 1992; García, 2001; Green, 2001) and profiting

local businesses (O'Brien, 2006; Smith, 2014), how the formalised procedures of event rights owners affect the host communities' ability of to leverage benefits from events is unclear. Therefore, this research examines the impact of formalised regulations of an event rights owner on a host community's leveraging efforts. Specifically, this study examines how the formalised hosting regulations of the International Cricket Council (ICC) influenced how the 2007 ICC Cricket World Cup (CWC) was leveraged in two host nations. That the event occurred a decade ago offers a particularly opportune research context, as event impacts only truly become event legacies when they endure beyond a 10-year period (Chalip, 2017).

3.3 Literature Review

3.3.1 Formalisation

Organisational structure, a basic tenet of organisational theory, refers to the internal pattern of relationships, authority, and communication that characterise a particular organisation and enables its operation (Thompson, 1967). Organisational structure is important to an organisation's operation because a reciprocal relationship exists between structure and organisational strategy (Miller, 1986). While researchers have identified several dimensions associated with organisational structure, three have been given greater attention: centralisation, formalisation, and complexity (Fredrickson, 1986).

Formalisation within an organisation refers to the "extent to which an organisation uses rules and procedures to prescribe behaviour" (Fredrickson, 1986, p. 283). Formalisation is thus a mechanism for coordinating behaviour and processes, thereby producing standardisation (Jansen, Van Den Bosch, & Volberda, 2006), and assisting organisations to function efficiently (Mintzberg, 1979). Formal hierarchical structure is one of the most important coordination mechanisms to link and integrate various parts of an organisation (cf. Ghoshal, Korine, & Szulanski, 1994; Tsai, 2002), relying on written rules, procedures, instructions, and communications (Khandwalla, 1977). For many large-scale sport events that move from city to city based on a bidding process (Getz, 2004; Thoma & Chalip, 2003), event hosting procedures are formalised through hosting contracts to ensure consistent operation and delivery of the event (Dowse & Fletcher, 2018). Despite the value of standardisation that formalisation provides (Organ & Greene, 1981), some negative impacts can also ensue.

A criticism is that since reduction of variance is the objective, formalisation hinders experimentation, innovation, and ad hoc problem-solving (March & Simon, 1958), reduces the likelihood of individuals deviating from structured behaviour (Weick, 1979), and constrains creativity, autonomy, and exploration (Lenz & Lyles, 1983; White, Dittrich, & Lang, 1980). Formalisation thereby restricts decision-making power by attempting to pre-program behaviour (Hall,

1999b). In some instances, the lack of autonomy imposed by formalised processes may alienate those who are tasked with implementation (Kanungo, 1979; Seeman, 1971).

3.3.2 Event rights ownership and the impact on event hosting

Usually, the right for a city or nation to host an event is awarded after a formalised competitive bid process (Thoma & Chalip, 2003). Event bidding occurs when "owners (or sellers) control the rights to host an event and bidders (or buyers) compete for those rights" (Getz, 2004, p. 6). Large-scale events must be executed according to strict guidelines established by the event rights owner (Chalkley & Essex, 1999; Marcus, 2011; Valle, 2012), with formalisation embodied in agreements stating guidelines and contracts regarding the hosting of events (Amis & Slack, 2008; Thoma & Chalip, 2003). These formalised requirements provide standardised criteria for event rights owners' evaluation of the candidate cities; maximise chances of on-time and on-budget event delivery; and protect the value of the event brand (Valle, 2012). Further, these host agreements underscore the power and control that the international event rights owner possesses (Cornelissen, 2007; Rogerson, 2009; Van Wyk, 2008).

Host agreements often direct local organising committees (LOC) to focus on operational activities relating to the delivery of the event itself (Marcus, 2011). Therefore, activities that involve strategic thinking, consultation, and collaboration with the local population on how to integrate elements unique to the hosting locale may become difficult to achieve (Rundio & Heere, 2016). As LOC engagement with the local population is often limited, the benefits to the host community may also be limited (Rogerson, 2009). Indeed, research has questioned the extent to which local residents and businesses benefit from large-scale events (Lamla, Straub, & Girsberger, 2014; Mules & Faulkner, 1996; Whitson & Horne, 2006), and has even suggested a negative impact (Crompton, 1999; Raco & Tunney, 2010; Taks et al., 2011). This scepticism highlights the utility of the current investigation, which seeks to establish whether formalised policies and procedures on the part of event rights holders can in fact constrain host communities from achieving positive outcomes.

Raco and Tunney (2010) suggest that with respect to large-scale events, the interests of local stakeholders are secondary to event delivery deadlines. In particular, they investigated the effects of the urban regeneration project for the 2012 London Olympics on small business communities located in London's East End – the main precinct for the 2012 Olympic Games. They found the eviction of small businesses to make way for the construction of Olympic venues decimated the business operations and the lives of residents.

Similarly, Pappalepore and Duignan (2016) investigated the impacts of the 2012 London Olympic Games on small local creative businesses in the immediate event precinct. The creative industries were named as a key sector for driving growth, boosting local business, and showcasing

culture, and a programme was thus developed to ensure the inclusion of small creative businesses in the Games' supply chain. However, while the primary funding agency of the cultural programme claimed the initiative a success (Legacy Trust, 2013), programme participants were disappointed by a perceived lack of support that would have enabled small businesses to leverage off the event. Pappalepore and Duignan (2016) concluded that inadequate community consultation, hyper-securitisation, barriers to leveraging, and a lessened priority of local interests as the Games approached, collectively limited the success of the initiative.

While the inclusion of cultural elements into the event product may serve to legitimise the hosting of mega-events, Pappalepore and Duignan (2016) argue that the cultural value is compromised because policymakers prioritise economic objectives and formalised contractual obligations over genuine local community involvement. Strict International Olympic Committee (IOC) rules regarding copyright also hindered leveraging activities related to the Games. As a result, the expected benefits of showcasing the local culture failed to materialise, thus limiting the benefits to the host community.

Rogerson (2009) revealed similar effects with the hosting of the 2010 FIFA World Cup in South Africa, where small local businesses, specifically tourism businesses, were disadvantaged by FIFA regulations and as a result did not benefit from the event. The bid to host the 2010 FIFA World Cup was predicated on a developmental thrust, particularly to improve the lives of certain disadvantaged groups. Through a tourism programme designed to support small businesses, the 2010 Host City Programme was launched to assist accommodation providers in preparing for the event, with emphasis on black tourism entrepreneurs (Rogerson, 2008, 2009). Specifically, the programme was to assist emerging entrepreneurs to improve the quality of their accommodations by instituting standards with a corresponding star rating (Rogerson, 2009). The star rating for accommodation was stipulated by FIFA's official accommodation, ticketing and information technology provider, MATCH Event Services. The provider insisted it would enter into contractual agreements only with accommodations that carried this star rating, as it was believed to be an assurance of quality and offered peace of mind to visitors. Despite national government efforts, the lack of readiness of the businesses and their inability to meet the standards stipulated by the event rights owner restricted programme success (Rogerson, 2009).

O'Brien and Gardiner (2006) demonstrated how regional government helped local small businesses form alliances to supply the 2000 Sydney Olympic Games. The returns were manifold: the government benefitted from the increased tax revenue generated from the extra and ongoing commercial activity, while local small business stakeholders benefitted from increased trade, new relationships, and potential upskilling through engagement in the event supply chain (O'Brien & Gardiner, 2006). Without such intervention at a more parochial level, national-level policy making is

reduced to mere platitudes, and host communities and local small businesses remain plagued by obstacles that block their access to the benefits from hosting large-scale events. So while benefits such as cultural showcasing can be gained from hosting large-scale events, the evidence suggests that host city stakeholders' access to these benefits is questionable or at best limited (Daspher, Fletcher, & McCullough, 2014).

While the majority of these examples illustrate that hosting agreements may restrict how a local destination can leverage an event, the extent of the limitation is unclear. Therefore, this research examines the impact of an event rights owner's regulations on a host community's leveraging efforts. Specifically, this study examines how the formalised hosting regulations of the International Cricket Council influenced how the 2007 ICC Cricket World Cup (CWC) was leveraged in two host nations.

3.4 Method

3.4.1 Setting: the 2007 ICC Cricket World Cup

Cricket is a popular sport throughout the countries of the British Commonwealth (Horne, 2010). The ICC, cricket's international governing body, represents 105 countries and is responsible for the worldwide governance of the sport. The ICC stages many cricket events including the ICC CWC, a quadrennial event that sees 10 national teams competing.

In 1998, keeping with its rotational system, the ICC awarded hosting rights to the West Indies Cricket Board (WICB) for the 2007 ICC CWC (Horne, 2010). The WICB (since renamed as Cricket West Indies) is the governing body for cricket in the West Indies. To deliver the event, the WICB incorporated a wholly owned subsidiary, ICC Cricket World Cup West Indies 2007 Inc. (CWC 2007 Inc.)

CWC 2007 Inc. proposed seven objectives for hosting the CWC: high-quality event management, brand legacy, infrastructure improvement, widespread economic opportunity, unique Caribbean promotion, regional integration, high profitability, and enhancement of the international popularity of cricket (ICC Cricket World Cup West Indies 2007 Inc., 2004).

3.4.2 The host nations of the 2007 ICC Cricket World Cup

The West Indies, also referred to as the Caribbean, is a crescent-shaped archipelago that separates the Gulf of Mexico and the Caribbean Sea to the west and south respectively, from the Atlantic Ocean to the east and north. The chain of islands stretches from the peninsula of Florida southeast to the north coast of Venezuela.

After a competitive bidding process, nine Caribbean countries were selected to jointly host the event. The host countries were Antigua and Barbuda, Barbados, Grenada, Guyana, Jamaica,

St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, and Trinidad and Tobago. The small size of the islands necessitated this co-hosting arrangement across multiple island-states as necessary no one island had the capacity, human and otherwise, to deliver the entire event.

Importantly, Caribbean cricket is more than merely sport (Beckles, 2004). Cricket in the Caribbean is believed to reflect "both the region's colonial history and its post-colonial aspirations" (Horne, 2010, p. 1555) and is "most obviously touched by elements of carnival" (Crabbe & Wagg, 2000, p. 70). The 2007 ICC CWC was heavily reported in the media and through government documents and reports as being a catalyst for economic and social development in the Caribbean and was expected to produce a lasting positive legacy (Jordan, 2011; Sinclair-Maragh, 2011; Tyson et al., 2005). In preparation for the event, all nine host countries made significant investments. However, Barbados and Jamaica allocated the largest amount of funds to host the event. The monies earmarked for the large-scale event project represented significant portions of each nation's national budget. The Government of Barbados allocated US$200 million of its budget, while the Government of Jamaica allocated US$105 million of taxpayers' money to host the event (Bhagoo & Rambarran, 2006). The substantial investment was an indicator of the importance of the event to the region and the event's projected role in acting as a catalyst for development.

Barbados and Jamaica provide an ideal context for understanding how the formalised regulations of the ICC influenced how the 2007 ICC CWC was leveraged, given the strategic focus of both countries to utilise the 2007 ICC CWC to realise specific benefits. Barbados is the eastern-most Caribbean island with an area of 430 square kilometres and a population of approximately 292,336. It is the wealthiest country in the Eastern Caribbean and has one of the highest per capita incomes in the region (Central Intelligence Agency, 2017; Lorde et al., 2011). Jamaica is the largest English-speaking Caribbean island with an area of 10,991 square kilometres and a population of 2,990,561. The island is the birthplace of reggae music and has a mature tourism industry that dates back to 1891 (Stupart & Shipley, 2012).

3.4.3 Data Collection and Analysis

Data were collected through 19 face-to-face in-depth interviews with key tourism stakeholders and former members of the 2007 ICC CWC local organising committees (LOCs) for Barbados and Jamaica. Purposive and snowballing techniques were used to select respondents who held key roles in delivering the event or who currently hold key decision-making roles within the tourism sector (Mason, 2002; Patton, 2002a). Nine of the participants were from Barbados and the other 10 participants were from Jamaica. A characteristic of qualitative samples is that sample sizes are relatively small to allow in-depth exploration of the focal phenomenon (Ritchie et al., 2014).

In-depth interviews are a meaningful tool for gathering the perspectives of respondents (Rubin & Rubin, 2012). Semi-structured interview questions, which allow both structure as well as flexibility, were developed to guide the interviews (Flick, 2015; Yeo et al., 2014). Structured interview questions included the following: "What is your assessment of how the event was leveraged?"; "What were some of the barriers/challenges to leveraging the event"; "How did the ICC regulations impact the leveraging of the event?"; and "Do you believe Barbados/Jamaica benefitted from the event?" While preconceived questions allow the researcher to guide the interview and focus on the overall research question, a semi-structured interview technique allows the researcher to probe respondents, when necessary, for a deeper understanding of responses that may allude to emergent themes. For example, as interviews progressed, it became apparent that the rigidity of the ICC's formalised event rights was responded to differently by each host nation; the nature of each host's respective response significantly impacted their capacity for local cultural inclusion in, and business opportunities from, the event. Therefore, as well as the preceding questions, probing questions such as "You mentioned that the regulations made it difficult to 'showcase local culture', would you mind elaborating on that?" Or, "what exactly did you mean when you used the term 'push back' in reference to the ICCs stipulations on using international suppliers?"

The interviews ranged from 45 to 120 min in duration, were recorded digitally, and were transcribed verbatim. To preserve participants' anonymity, a five-character alpha-numeric identifier by country was used. For example, the fourth participant interviewed in Barbados is identified as 04BRB, and the second participant interviewed in Jamaica is identified as 02JAM (see Table 1).

Table 1: List of interview participants.

Participant Identifier	Organisation	Position with 2007 ICC CWC event
01BRB	Tourism Marketing	
01JAM	Consultancy, Engineering	Senior LOC member
02BRB	Tourism Marketing	
02JAM	Entertainment Production	
03BRB	National Sports Agency	LOC member
03JAM	Tourism Education (tertiary level)	
04JAM	Stadium Facilities Management	LOC member, transportation
04BRB	Consultancy, Business Management	Senior LOC member
05BRB	National Security	LOC member, security
05JAM	Government Ministry	
06BRB	Tourism and Transportation	
06JAM	Tourism Education (tertiary level)	
07BRB	Tourism and Transportation	Transportation readiness for the ICC CWC
07JAM	Tourism Marketing	LOC member, tourism; Member of CWC promotion team
08BRB	Event Management, Finance & Accounting	LOC member, finance
08JAM	Hotel and Tourism Management	
09JAM	Event Production	Senior LOC member
09BRB	Consultancy, Project Management	Senior LOC member
10JAM	Tourism Marketing	

FORMALISATION

Formalised regulations as an impediment to destinations' ability to leverage

-Preference for global partners-suppliers and sponsors
-No provisions for local culture

LEVERAGING OBJECTIVE

Using the event as an opportunity to optimise host destinations' benefits

-Significant reach and opportunity for host nations and region
-Regional benefits: economic, social, tourism, brand image. Infrastructure development, sport development (cricket)
-Showcase Caribbean cricket
-Showcase Caribbean culture

ABILITY TO LEVERAGE

Impact of formalised regulations on host destination

-Limiting opportunities for local suppliers
-Limiting display of local culture
- Leakage from local economy

CIRCUMVENTING RESTRICTIONS

-Subcontracting with global partners
-Capacity and confidence to "push back"

BENEFITS FROM LEVERAGING

-Benefits of strategic planning
-Experience in large-scale event hosting
-Knowledge transfer: starting local event-related businesses
-Monetary savings to local economy
-Inclusion and celebration of local culture
-Local business inclusion and benefit

Figure 1: How formalised regulations influence host destinations' ability to leverage events

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Each author individually read the transcripts multiple times to become familiar with the data. During that period of independent work, the authors developed the initial open codes (Corbin & Strauss, 2008; Creswell, 2013). The authors then convened to discuss their individual results and deliberated over several rounds until they reached agreement on themes and theme labels. When differences arose, the authors referred to the raw data to arrive at a resolution. The authors then used the open codes and knowledge of the event leverage and formalisation literature to cluster the data into various themes. These steps ensured the data analysis could withstand scrutiny, serving to enhance the trustworthiness of the study (Lincoln & Guba, 1986). A grounded theory model emerged from the analysis (see Fig. 1, p. 57), showing how the formalised regulations of the event rights owner influences host destinations' ability to leverage events.

3.5 Results

The data analysis produced four main themes and nine sub-themes that depict how the formalised regulations of the ICC influenced Barbados' and Jamaica's abilities to leverage the 2007 ICC CWC:

- Opportunity of a lifetime (significant reach and opportunity, an opportunity for the region, and an opportunity to showcase culture);
- Restrictions attributed to formalised regulations (preference for global partners – suppliers and sponsors and no provisions for local culture);
- Circumventing restrictions (subcontracting with global supply partners and capacity and confidence to "push back");
- Leveraging benefits in a highly formalised environment (the benefits of strategic planning and knowledge transfer: starting local businesses).

The themes and representative data pertaining to each are presented.

3.6 Opportunity of a lifetime

3.6.1 Significant reach and opportunity

The event was of significant magnitude for the region, which had not hosted a large-scale sport event since the 1960s:

…[A]t last the region was able to host a major global event, sporting event … this was a major accomplishment for the region…. I know that the only other comparable event in this part of the world would have been the Commonwealth Games, which was hosted here [Jamaica] in the 1960s. Since then there's never been a similar size event, and so to have a Cricket World Cup, which would have attracted [a large global] viewership, would have been quite an accomplishment (06JAM).

Participants saw the size of the event, coupled with the importance of the sport of cricket to the region, as an important driver for the development of both the individual countries and the wider region:

> …[B]ecause for the first time I believe Jamaica was now to host an event of magnitude … and an event that had a lot of relevance to us, given where cricket was for us as a region, we felt that it was an important event, and an important step for the country .… (07JAM)

> Because of its size and scope, the event was viewed as a significant opportunity for the region.

3.6.2 An opportunity for the region

The Caribbean nations had to work together to stage the event because no single Caribbean nation had sufficient resources to stage the event itself:

> I thought there was an opportunity for the Caribbean because it couldn't be Barbados alone… but it was an opportunity for the Caribbean to do something that had not been done before…. It had to be a Pan-Caribbean undertaking… (08BRB).

Indeed, respondents noted the presence of an internal and external perception that the Caribbean nations would be unable to host an event of significant size.

Thus, the event was seen as an opportunity for Caribbean nations to work together to improve the reputation of the region: "The region ended up with a set of infrastructure and a reputation for delivering an event" (04BRB). The event was a statement of the Caribbean's capacity in event hosting:

> [The event] represented a statement as to the strength of the Caribbean people. Being cricketers ourselves…. I think it did a lot for us as a people, feeling strong, feeling a part of the global community through cricket …. The event presented the opportunity for us to truly knit together those resources from islands that are often seen to be separated by water (05BRB).

Note also that the above respondent emphasised that the Caribbean's cultural connection to the sport of cricket connected the region to the global community. Thus, the joint hosting agreement presented an opportunity for the countries to collaborate.

3.6.3 Opportunity to showcase culture (of cricket and the region) to the world

Cricket is a sport that has strong ties to the culture of Caribbean nations: "cricket is very critical to the psyche of Barbadians" (03BRB). Respondents believed that the way in which the Caribbean people celebrate cricket would make the 2007 ICC Cricket World Cup unique:

> [Our culture is what] made cricket special and that is what we wanted to be showcasing on TV; that culture, the music, the way we do it in the Caribbean, how we dress …. (01BRB)

Indeed, showcasing the local culture through the event was envisioned to occur through both the broadcast media and the unmediated experiences of tourists who visited the region for the event:

> …[C]ricket, which is one of our hallmarks, should I say, heritage sports… was being recognised in the territory - where persons from all over the world could come to the Caribbean as a destination to enjoy the game and to immerse themselves in our culture… (03JAM).

Respondents stressed that the Caribbean nations hosting the ICC Cricket World Cup would provide a great opportunity to showcase the Caribbean culture, the sport of cricket, and the interplay between how Caribbean nations celebrate cricket.

In summary, respondents saw the event as being of sufficient scale to bring global attention to the region. As no one Caribbean nation had the capacity to host the event, the event presented the opportunity for nations to work together to increase the capacity and reputation of the region. Further, given the cultural significance of the sport of cricket to the region, and the celebration of Caribbean culture through cricket, the event was viewed as a significant opportunity to showcase Caribbean culture to the rest of the world.

3.7   Restrictions attributed to formalised regulations

While the event was perceived as a significant opportunity to showcase Caribbean culture to the rest of the world, the regulations set by the contract with the ICC, the rights holder for the event, were considered to be restrictions on how and whether this could be done.

3.7.1   Preference for global partners- suppliers and sponsors

Participants viewed the contract provided by CWC 2007 Inc. as favouring global suppliers and sponsors: "That contract was very anti-local.… The ICC benefited more than the local." (04JAM). Another participant said:

> The problems that we had to face were those created by the contracts which were developed by ICC and WICB. [There were] hoops that we had to jump through…. What made it difficult were the regulations imposed by the ICC - some of them were unnecessary, but had to be fulfilled (01JAM).

The regulations imposed by the contracts of the event rights owner and the use of preferred supply partners were therefore thought to exclude local Caribbean companies:

> …I don't think that any of the countries in the West Indies benefitted as much as they ought to have benefitted. I think the contracts were highly skewed towards non-West Indians. For example, they gave a South African company the contract to clean the Stadium [Greenfield Multi-purpose Stadium]… (04JAM).

However, the South African company subsequently subcontracted the job to a local cleaning company, noting that while the subcontract retained some benefits for the region, the foreign company diverted further funds from coming into the region: "All they [the South African company] did, [was] they come [sic] in and employ a local company and just reap all the benefits and gone. I don't think enough was done to make sure that Caribbean companies really benefit…" (04JAM). Indeed, local companies did not feel they could be involved with the event:

> The private sector felt completely left out of it. Companies in Jamaica wanted to be associated but could not afford to be associated given the sponsorship categories...So a lot of the private sector actually felt that [the CWC] was a waste of money for they couldn't associate with it. (09JAM).

Note from the above quote that local companies' feeling of exclusion as a result of not being involved with the event made them less interested in the event. Some went as far to describe the event as an "outsiders' event":

> So my criticism of the Cricket World Cup was that it was too much of an outsiders' event, and the local organising committee didn't seem to have enough impact in terms of driving the event. (06JAM)

Therefore, the awarding of supplier contracts and sponsorships to companies outside of the Caribbean nations were believed to exclude local companies, minimising the impact that the host nations could have experienced.

3.7.2 No provisions for local culture

While participants saw showcasing Caribbean and cricket culture as key opportunities in hosting the event, they believed the provision of contracts and sponsorships to global partners hindered the host nations' ability to do so:

> The way they executed it might not have taken account of the sensitivities of the local destinations…. Their agenda was the cricket and I think less so, the embracing of the local tourism components of each destination, and the integration and fusion of that into the cricket.... I didn't see any part of the ICC's or LOC's plans where they sought to embrace local food or the local elements. (07JAM)

Respondents highlighted that considerations of and for the local culture and ethos of the host destinations were largely ignored:

> We want people to walk around and, you know eat a little jerk pork and go to reggae [show]. You know? Usually things that, these are things they hear about Jamaica, want to smoke a "spliff", especially like how it turned legal. These are the things that, that sum up Jamaica…it's

not just the cricket ground I'm going to. You know, you a mix in with people and you want to participate in the culture and learn about the country. (01JAM)

Visitors from other countries also want to experience the culture of the country they are visiting:

The World Cup was never ours; it belonged to the ICC... And so simple things like, you couldn't take food into the stadium. Now this is a normal thing for most events that we [Jamaicans] have. And so what happened was that when you ban people from doing things which are normally, culturally acceptable then it sort of [affects] the ability of the sport to capture the imagination. (06JAM)

Note the above respondent emphasises that it was not just ignoring the local culture but actively banning people from acting in culturally acceptable ways that caused consternation. Food and music are two key markers of Caribbean culture, and specifically, Caribbean culture associated with watching cricket: "I don't think that the ICC at the time really had embraced the culture, because they didn't want people to bring [their] food…no music, yeah". (02BRB).

Another respondent said: "No music, no food…. They [ICC] came in and imposed their culture and will on the most flavourful people in the world" (01BRB), thus limiting the involvement and portrayal of Caribbean culture, spirit, and flavour.

The various restrictions led respondents to believe that the event had been sanitised and that the Caribbean culture, which could be a key attraction for potential attendees, was lacking:

Now I understand that to meet certain standards, certain things can't happen. But how can you have a Caribbean event and there's nothing about it that is Caribbean? That doesn't make any sense… If we have an event, we also want to make sure that some of our culture is part of it. And I think to a large degree the World Cup did not have that, and it lacked the sort of "Caribbean-ness" … The flavour. And that's what it lacked, because of the rules that you can't do this, you can't do that, you can't do whatever. Our value added is who we are; it should be added to that product (06JAM).

The respondents argued that the restrictions imposed by the event rights owner limited how local businesses could be involved in and benefit from the event. Further, the restrictions hampered the inclusion of how the Caribbean culture was displayed around and through the sport of cricket. Respondents saw the event as lacking the Caribbean culture, spirit and flavour, for which the region is renowned.

3.8   Circumventing restrictions

While the contracts between CWC 2007 Inc. and the LOCs were seen as largely restrictive, in some instances the local nations either pushed back on suggested impositions or in some way circumvented the restrictions.

3.8.1   Subcontracting with global supply partners

The Barbados LOC approached the global supply partner who was awarded a hospitality contract for the event and negotiated a subcontract:

> There was a company that was hired to provide the hospitality around the Cricket World Cup…it was an English company. So we [LOC] went to this company, and we [LOC] said to them, "Listen, we could do this". So we subcontracted to do the hospitality for Barbados. We ended up making something like $4.5 million…. (08BRB)

Approaching the global supply partner and setting up a subcontract for the hospitality services to be supplied locally therefore brought substantial economic benefit to the region. This was the result of the Barbados LOC taking the initiative to negotiate a subcontract.

3.8.2   Capacity and confidence to "push back"

In another instance in Jamaica, an external company that was previously used by the ICC at other events was brought in by the ICC to provide advice on transport operations and supply transportation services:

> [The ICC] tried to foist on us some transport people from the States [US] who didn't know half of what we knew, and in fact we told [the ICC] that we're not using them and they were very upset with us ... and they put a lot of pressure on us. (04JAM)

As the above quote demonstrates, the global transportation supply partner did not have sufficient local knowledge and was not viewed as adding any value beyond what the local transportation companies could offer. Therefore, the LOC challenged the ICC and suggested that the transport operations could be handled by local operators.

Host nations queried some of the requests that the ICC made and suggested that they were unnecessary in the particular cultural context:

> The other thing we did is the ICC had all these things like regulations, things that you must do. That didn't make no sense for the Caribbean. For instance, around the Kensington Oval, we were supposed to have a moat. Like, we not doing that! Because in India [there] could be a violent pitch invasion. That ain't happening in the Caribbean. We drinking rum. We just having a ball. We not having no moat. …. Now that moat would have cost us another couple of million dollars, right? … So, we were able to push back and say it didn't make sense in the Caribbean (08BRB).

The ICC had requested a moat around the venue for security purposes. However, the LOC was able to argue that a moat was not necessary in the particular cultural setting, thus saving the LOC a considerable amount of money. However, while Jamaica and Barbados were able to question some of the directives of the ICC, not all hosting nations had that capacity:

> They bring something to us [Barbados], we take it apart and stuff like that ... You've got to tell us why we got to do this. You've got to convince us we've got to do this, and then we've got to get the best price. Some of the other countries, like the small islands, they didn't have that capacity to do that. (08BRB)

To leverage benefits from the event, LOCs had to either push back against what were viewed as unwarranted ICC requests or create means to satisfy ICC demands while also securing benefits for local businesses.

3.9   Leveraging benefits in a highly formalised environment

3.9.1   The benefits of strategic planning

Interviewees felt that Barbados benefited more than any other host nation because of the strategic planning that was done: "Barbados benefited because we grasped the opportunity more than a lot of the other islands. We took on and did things different … And even in the planning, I think we had some visionary leadership" (08BRB). Thus, leadership, particularly in the form of a strategy that focused on a plan for when the event was over, was seen as integral to the benefits that Barbados generated:

> Barbados from very early on intended to seek the legacy component … so when the event ended… I started the transition from project management and started to focus on this legacy (09BRB).

While the Barbadian respondents were generally positive about the strategy of the Barbados LOC and the ensuing benefits, Jamaican respondents expressed a contrasting sentiment: "I don't think it [the event] was leveraged enough because I don't think the government had a plan…" (09JAM).

One initiative that was planned and undertaken in Barbados was the gaining of experience and upskilling of locals through a deliberate attempt to learn from visiting event professionals at the core of staging the event:

> We had some visionary leadership that thought, "If we can do this, let's get the experience from these people. With all these people coming in, let's soak up everything we can get from them. Let's pick their brain and stuff like that and when they're gone, we can do this thing".

Barbados actually built that into our plan. We assigned people to study people, to shadow people and stuff like that, so that we could get something out of it. (08BRB)

This deliberate learning system proved to be effective as individuals involved went on to start their own event-related businesses, which continue to operate.

3.9.2 Knowledge transfer: Starting local businesses

Locals associated with the event learnt valuable event management skills and knowledge, which they have since utilised to form businesses in the local economy: "Business activity exploded, and a lot of businesses came out of the World Cup. My events business came out of the World Cup, you know. So business activity, for sure, we had expansion in business activity" (08BRB). Another respondent said:

What I saw when I went throughout the Caribbean is just the blossoming of a lot of persons who worked on Cricket World Cup. Creating all sorts of frameworks and jobs and doing things, which came as a direct result of the experience. And I could look at it and see a lot of fledgling businesses that are headed up by people who actually had the World Cup experience. (09JAM)

As the above quotes demonstrate, involvement with the event provided experience and changed the outlook of individuals in relation to the business side of event hosting. Thus, knowledge gained from the event-hosting process remained in the destination.

3.10 Discussion

The Caribbean region viewed the 2007 ICC CWC as a significant economic opportunity because its magnitude gave it the potential to be a catalyst for development and to signal the region's ability to host large-scale events. This expectation was consistent with past research that has shown that events can be used to encourage development (Jago et al., 2003; Moscardo, 2007) and to convey/project a positive image to the rest of the world (Chalip, Green, & Hill, 2003; Dimanche, 2003; Getz & Fairley, 2004; Gibson, Qi, & Zhang, 2008). The event was particularly relevant to the region given the significance of cricket to Caribbean culture (Crabbe & Wagg, 2000; Horne, 2010). However, benefits that were originally expected for the region either did not materialise or emerged to less than the projected extent (Majumdar, 2009). Interviewees identified that underperformance was due in part to the formalised directives from the event rights owner. In particular, the formalised directives effectively locked out many local businesses and reduced the locals' ability to express and celebrate their culture through the event, thus restricting the host destinations' ability to leverage the event.

3.10.1 Restricted use of local contractors

While formalised regulations in event hosting contracts are often used to ensure on-time delivery and preservation of the event's brand image (Valle, 2012), in the case of the 2007 ICC CWC major supply contracts such as stadia cleaning and transport were awarded to companies from nations such as South Africa, and local businesses believed that the high price of sponsorship excluded them from opportunities related to the event. The event was therefore seen as an "outsiders' event" rather than one belonging to the Caribbean. While research has suggested that local businesses can and should leverage an event (Chalip & Leyns, 2002), this study's findings suggest that the regulations imposed by the event rights owner can indeed obstruct local businesses' opportunities to achieve benefits (Pappalepore & Duignan, 2016; Rogerson, 2009).

3.10.2 Restraints on local culture

Some of the regulations for the 2007 ICC CWC were believed by respondents to suppress the host destination's ability to inject local culture into the event. Host destinations regard events as opportunities to showcase and celebrate their unique cultural characteristics (Santos et al., 2016), which include food, music, dance, and art as forms of cultural expression (Getz, 2008). A significant component of the Caribbean's appeal as a tourist destination is the culture of its people (Albuquerque & McElroy, 1992; Butler, 1993). The Caribbean nations expected that hosting the 2007 ICC CWC would showcase the Caribbean culture to tourists within the venues and also via the media broadcast of the event, with lasting post-event effects. However, these expectations were not met. Indeed, a study of Barbadian residents found that the anticipated cultural exchange between tourists and residents did not translate into a post-event benefit (Lorde et al., 2011).

Further, according to the respondents, formalised guidelines for the 2007 ICC CWC restricted the expression of how Caribbean people experience and celebrate cricket through the integration of local music and food—key markers of Caribbean culture. While events are believed to be opportunities to celebrate and showcase culture to the rest of the world (Buch, Milne, & Dickson, 2011; García, 2001; Jordan, 2012), the 2007 ICC CWC was largely sanitised and devoid of Caribbean culture.

3.10.3 Resistance to restrictions

Despite the control and restrictions imposed by the event rights owner, in some instances the host nations succeeded in circumventing restrictions. For example, becoming a subcontractor to a global supply partner allowed some local companies to benefit economically. Some local companies were able to position their superior knowledge of local operations (e.g., transport services) over

foreign suppliers to obtain a direct contract. Further, resistance to directives that seemed culturally inappropriate, such as building a moat around the stadia, saved on unnecessary expenditure.

These examples illustrate the need to understand and consider local cultural practices and underscore the importance of consulting stakeholders with local knowledge (Gertsen, 1990; Hofstede, 1998; Shenkar, 2001). Differing norms, values, practices, and expectations may strain relationships between foreign companies and local stakeholders (Aaltonen & Sivonen, 2009; Orr & Scott, 2008; Turner, 1999). In the case of the 2007 ICC CWC, the ingenuity of some local companies to pursue subcontracts resulted in substantial economic benefits to the region. While the use of subcontracting for events is not new (Dickson, 2010; Pugh & Wood, 2004; Smith, 2010), the findings in this study show that even if local companies are not awarded main supply contracts, subcontracting with foreign suppliers can yield benefits to the region.

Even though event rights holders may prefer to work with global supply partners that they use from event to event, the opportunity for subcontracting demonstrates that entrepreneurial local businesses can find ways to benefit. Their success, however, raises the obvious question of why local companies within the host nations and with knowledge of cultural norms and practices were not preferred initially over an overseas supplier—especially when a lack of understanding and inclusion of local knowledge and cultural practices often results in the failure of foreign firms (Hofstede, 1998; Johnson, Lenartowicz, & Apud, 2006).

3.10.4 Consortia hosting

As no one Caribbean nation had the resources or capacity to host a large-scale event, nine nations in the region jointly hosted the 2007 ICC CWC. Joint or consortia bids have been increasing in order to share resources, costs, and the risk of hosting events (Cornelissen, 2004; Humphreys & Prokopowicz, 2007). However, while various nations may jointly stage an event, they do not necessarily do so collaboratively. Instead, each host nation may view and interact with the formalised regulations differently, especially as some nations may have more power to question or push back against the formalised mandates of the event rights owner.

Barbados and Jamaica are prominent island nations within the Caribbean and were likely to be forthright in their interactions with the event rights owner. Whereas respondents suggested that the smaller, less influential nations might have been less inclined to question the formalised directives. These circumstances could highlight the importance of power, or perceived power, in relationships (Saito & Ruhanen, 2017). Stakeholders who have more perceived power could be more likely to try to dictate or at least influence relationship conditions (Gray & Hay, 1986; Waddock, 1989). A power differential becomes relevant when it comes to capacity to leverage events.

3.10.5 Leveraging of events

Cities and nations that leverage an event are more likely to receive benefits than those that do not (Chalip, 2014). In seeking to benefit from the 2007 ICC CWC, Barbados engaged in pre-event strategic planning to realise outcomes in terms of knowledge on how to stage large-scale events. The Barbadians put policies in place to ensure that knowledge transfer to locals occurred. Skill and knowledge transfer from the event were evident in the destination, which led to the creation of event-related start-up businesses that continue to thrive 10 years post-event. Barbados focused on long-term benefits, whereas other countries were preoccupied with short-term visitation-related benefits or the benefits from a new or improved stadium—a focus that limited wider strategic planning. The results of this study demonstrate that, not only does successful event leverage require consideration of both short- and long-term objectives (Chalip, 2004, 2014), but crucially, and a point not highlighted in previous research, is that leveraging success is also a function of how hosts strategically respond to the nature of formalised event rights agreements. An acquiescent response limits capacity for leverage, while a more strategic response catalyses the potential for creating short- and long-term opportunities for local business and cultural stakeholders.

3.10.6 Accountability to host cities

Event rights owners have begun to face criticisms in the form of questions regarding accountability for the debt and negative impacts accumulated by the host cities of large-scale events (Dowse & Fletcher, 2018; Rundio & Heere, 2016). Some event rights owners, such as the IOC, have introduced mandates that host cities outline plans at the bid stage to ensure positive legacies within host cities (Leopkey & Parent, 2012a), and both the IOC and FIFA have incorporated human rights principles into their host contracts to show the potential for additional non-monetary benefits (Dowse & Fletcher, 2018).

As the results of this study show, while the charter of the event rights owner encourages positive benefits to the city, the formalisation of regulations can hinder the effective leveraging of events to achieve positive outcomes. Therefore, event rights owners should consider how their practices facilitate or hamper benefits to the host destination. This issue is of particular concern to developing nations, which may be more vulnerable to exploitation by event rights owners and where formalised practices may be particularly disadvantageous (Dowse, 2014). Indeed, event rights owners may be ethically obliged to withhold hosting rights from countries categorised as developing countries, as they are potentially more vulnerable to exploitation (Dowse & Fletcher, 2018).

3.11 Conclusion and future directions

While McGillivray and Turner (2018) describe the emergence of international resistance to bidding for major events, this research adds depth to their thesis by demonstrating event hosts' resistance to the actual conditions set by event owners. Event rights owners use formalised hosting contracts to ensure consistency and protect the value of the event brand (Valle, 2012). However, regulations contained in hosting agreements can either hinder or help relationships between event rights owners and local stakeholders. The regulations of event rights owners can create challenges for how the host city can leverage the event. Detriments include alienation of local stakeholders, exclusion of local cultural practices in the event, preference for global partners, and restriction of benefits to local businesses and the host community. As a result, the host city's ability to include cultural idiosyncrasies that enhance event and destination branding is constrained. If events are to be truly inclusive and sustainable, event rights owners must consider the cultural sensitivities of the host when drafting formalised hosting agreements, making hosting regulations more accommodating of local ethos and sensitivities and including provisions to ensure that residents and local businesses benefit from the event.

This research took place 10 years after the focal event. While a decade constitutes an ideal timeframe for examining the legacy (Chalip, 2017), all the key stakeholders who were involved with the event could not be identified and interviewed. Additionally, after 10 years, respondents' memory and accuracy of recall of certain activities could be questionable. To address this effect of time on memory, secondary and archival records were accessed to render a more complete picture, although after 10 years, even some of these archival data proved difficult to retrieve. Future research could employ a longitudinal approach to examine how the formalisation of host contracts is received and enacted by different host cities. A longitudinal approach could follow an event through the inception, bid, planning, execution, and legacy phases, thus aiding the timely collection of data and making it less susceptible to inaccuracies.

Contribution of each author

Donna conceptualised and designed the study, collected all data, and led the analysis. Donna drafted the first version of this paper. Donna revised subsequent versions of the manuscript.

Sheranne independently coded the first author's original coding patterns, and worked with the first author to cross-check the coding. Sheranne revised and rewrote subsequent versions of the manuscript.

Danny reviewed the coding patterns of the data and discussed the emergent themes with all authors. Danny revised and rewrote subsequent versions of the manuscript.

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CHAPTER 4 -   PAPER TWO

What about the event? How do tourism leveraging strategies affect small-scale events?

4.1 Abstract

This study draws on contingency theory to investigate whether tourism leveraging strategies designed for mega-events are applicable to small-scale events. In-depth interviews conducted with eight event managers of small-scale events revealed that the managers perceived grant funding offered to promote tourism leveraging to be a diversion from the core purpose of staging the event. Restrictions on grant funding directed the event managers' focus to increasing the number of tourists and their length of stay and their spending in the destination. While event managers acknowledged that engaging in tourism leveraging expanded the event's target markets and increased the size of the event, they believed that tourism operators were the key beneficiaries of the leveraging. Mutual benefits between event and tourism organisations occurred when the funding partner(s) and the event collaborated. A grounded theory model was developed to show the impact of tourism leveraging strategies on small-scale events. The findings are consistent with the tenets of contingency theory, which suggest that managerial solutions are not automatically scalable.

Highlights

- Leveraging strategies' effects vary with event size.
- Grant funding that encourages tourism leveraging diverts attention from events' core purpose.
- Effects of tourism leveraging strategies are contingent on event-related factors.
- Collaboration between tourism organisations and event managers is critical.

4.2   Introduction

The utility of deriving tourism benefits from hosting events has long been acknowledged (Burns et al., 1986; Chalip, 2004; Getz, 2007, 2008; Mules & Faulkner, 1996). The tourism benefits flowing from hosting events are multifaceted and include destination competitiveness from offering a diversified tourism product (Getz, 2007, 2008; Sant et al., 2013), upgraded event facilities and transportation infrastructure (Dwyer et al., 2005; Hiller, 2000), and an increased influx of visitors (Mules & Faulkner, 1996). Further, event tourists whose primary motivation is to attend or participate in an event spend more, stay longer in the destination, and often travel in a group, suggesting that event tourists are a lucrative target market (Gibson, Willming, & Holdnak, 2003; Tang & Turco, 2001; Yoon, Spencer, Holecek, & Kim, 2000).

While tourism benefits from events were initially expected as a matter of course (Gursoy & Kendall, 2006; Shipway, 2007), recent research has suggested that the outcomes of events are maximised only if strategies are designed to reach the stated tourism objectives (Chalip, 2014). Ensuring maximum gain from an event is known as "event leverage" (O'Brien & Chalip, 2007a), and focuses on the strategies used to achieve the stated outcomes (Chalip, 2004; O'Brien & Chalip, 2007a). Destinations seek to leverage events to secure a competitive advantage in the marketplace and to achieve destination goals (Jago et al., 2010). For example, destination marketers can use leverage to optimise limited resources (Hall, 2009; Kellett et al., 2008; Stokes & Jago, 2007), distribute benefits of the event over a wider area (Fairley & Kelly, 2017; Fairley, Cardillo, & Filo, 2016; Kellett et al., 2008), or create opportunities for local businesses and stakeholders to benefit from and create associations with the event (Beesley & Chalip, 2011; Chalip & Leyns, 2002).

Much of our knowledge of event leverage is based on research regarding mega-events such as the Olympic Games and FIFA World Cup (Beesley & Chalip, 2011; Bell & Gallimore, 2015; Boukas et al., 2012; Gardiner & Chalip, 2006; Grix, 2012; Karadakis et al., 2010; Smith, 2014; Tichaawa & Bob, 2015; Tripodi & Hirons, 2009), and to a lesser extent hallmark and regional events (Chalip & Leyns, 2002; O'Brien, 2007; O'Brien & Chalip, 2007b). However, destinations and tourism organisations adopt event leveraging strategies into their marketing mix for events of all scales. While Higham (1999) notes the relative benefits of hosting small-scale events over mega-events, little research has examined the effects of leveraging strategies on small-scale events. Chalip (2017) suggests that instead of one-size-fits-all thinking, leveraging strategies should be designed specifically to target a particular host destination.

Chalip's (2017) proposition compares to the principles of contingency theory. Contingency theory suggests that a specific strategy cannot be applied to all circumstances and organisations with the expectation of similar results (Otley, 1992), and particularly with respect to organisations of different sizes (Neilsen, 1974). Thus, the tenets of contingency theory would suggest that leveraging

strategies devised for mega-events may not be appropriate for small-scale events. While leveraging strategies for a mega-event are not likely to affect the event itself, use of those same strategies for small-scale events may have consequences for the event, and by extension affect the optimisation of tourism outcomes. Therefore, this study uses contingency theory to justify the focus of examining tourism leveraging strategies on small-scale events.

4.3   Literature review

4.3.1   Event leverage

Leveraging theory has its antecedents in the disciplines of strategic management (Collis & Montgomery, 1995) and finance (Misener, 2015). Event leverage is a strategic and proactive approach for formulating, maximising, and distributing the potential benefits from an event (Chalip, 2000, 2004, 2014; Gardiner & Chalip, 2006; Kellett et al., 2008). Specifically, event leverage is "the phenomenon of strategically planning for the maximization of both short-term and long-term event outcomes" (O'Brien & Chalip, 2007, p. 297). This approach views events as the "seed capital" from which further benefits are derived (O'Brien, 2006, p. 258). The benefits from events can be economic or business (Chalip & Leyns, 2002; O'Brien, 2006), social or community (Kellett et al., 2008; O'Brien & Chalip, 2007b), sport participation (Misener, 2015; Weed et al., 2015), or tourism (O'Brien, 2006). While events can be leveraged for a multitude of reasons (cf., Smith, 2014), we focus on the leveraging of events for tourism gain.

4.3.2   Leveraging events for tourism gain

Events have been touted as a useful means of generating tourism in destinations (Boukas et al., 2012; Chalip, 2000, 2002; Getz, 2008; O'Brien, 2007; Ziakas, 2014b), and a growing body of literature has highlighted the tourism benefits associated with leveraging events (Beesley & Chalip, 2011; Chalip, 2002, 2004; Gardiner & Chalip, 2006; Kellett et al., 2008; O'Brien & Chalip, 2007a). Destinations therefore employ leveraging strategies to maximise the event's tourism impact (Ziakas, 2010, 2013, 2014b; Getz, 2007, 2008; Ziakas & Costa, 2011a, 2011b).

Much of the work on event leveraging for tourism gain has been based on mega-events (Chalip, 2000, 2002; Gardiner & Chalip, 2006; Kellett et al., 2008; O'Brien & Gardiner, 2006). The first explicit use of event leveraging for tourism gain was Australia's attempt to capitalise on the projected gains from the hosting of the 2000 Sydney Olympic Games (Chalip, 2002; Gardiner & Chalip, 2006; O'Brien, 2006). However, not all large scale events are successfully leveraged successfully for tourism gain (cf., Agha, Fairley, & Gibson, 2012).

Although research has focused on the benefits from leveraging mega-events, it may be useful to consider the potential benefits that could be obtained from leveraging small-scale events.

According to Higham (1999) small-scale events can be more advantageous to host destinations as they often operate within existing infrastructure, require minimal public investment, and avoid crowding and congestion that is often associated with mega-events. Destinations have sought to leverage events of all sizes, with the anticipation of similar success. However, despite destinations' adoption of event-leveraging strategies, negligible research has examined leveraging theory in the context of small- to medium-scale events (Misener, 2015). Drawing on contingency theory, this study examines the applicability of tourism leveraging strategies devised for mega-events to small-scale events.

4.3.3   Contingency theory

Contingency theory was developed as a response to criticisms of other managerial theories that were believed to make universalist assumptions (Luthans, 1973). Contingency theory (Burns & Stalker, 1961) posits that no managerial solution is equally suited to all organisations in all circumstances (Otley, 1992), as the components of a solution or strategy depend on the specific circumstances of the organisation (Otley, 1992; Van de Ven & Drazin, 1984). In particular, the situational factors and environment in which a managerial solution is applied must be considered (Luthans, 1973). There are four key tenets of contingency theory. Contingency theory postulates that there is no single or universal strategy to address management challenges; and that the design and management of an organisation and its subsystem must 'fit' or rely on the interplay between the environment. Further, contingency theory suggests that clear-cut and formal differentiation of subsystems is necessary to achieve optimal performance; and the needs of an organization are better satisfied when the prevailing conditions or environment are assessed. These tenets are then used to assess the most appropriate approach to resolve a challenge (Lawrence & Lorsch, 1967; Luthans, 1973).

Thus, contingency theory posits that the application of managerial processes or solutions in varying situations may lead to varying results (Schreyögg, 1980). One situational influencer of a managerial solution's effectiveness is the size of the business or organisation (Neilsen, 1974). Small businesses obviously differ from their larger counterparts in scale and scope, and as a result strategies designed for one size of business do not perform similar to a business of a different size (Shenhar, 2001). Thus, tourism leveraging strategies devised for mega-events are not likely to be equally applicable to small-scale events. Therefore, contingency theory can be usefully applied to understand the environmental, situational, and management considerations that influence the leveraging of small-scale events. Understanding the impact of tourism leveraging strategies on small-scale events will provide insight for event managers and policymakers as they devise leveraging strategies to optimise tourism outcomes.

4.4   Method

4.4.1   Qualitative approach

As little is known about the impact of tourism leveraging strategies on small-scale events, a qualitative method was used. A qualitative method is appropriate as there are no preconceived notions (Miles & Huberman, 1994) of how tourism leveraging affects small-scale events. To understand the impact of event leveraging strategies on small-scale events, face-to-face in-depth interviews were conducted with eight event managers across seven events. Purposive sampling was used to select respondents (Mason, 2002; Patton, 2002a). All of the events were located within the same geographic region in Australia, and received funding from a tourism organisation that was specifically for tourism generation around events. The specific grants provided by the state DMO are available to events that occur within regional areas within the state. The criteria for the grants are based on tourism objectives. Events are also able to access grants from the local council; however, the criteria for council grants are based on showcasing or building capital within the local community, rather than generating tourism. The grants from the tourism organisation are awarded on the basis of a competitive application process and have strict directives as to how the funds can be spent. The events included one arts and cultural event, one food festival, two music festivals, and three sport events. The event managers from each event were identified and contacted to determine their willingness to share their experiences around leveraging their events for tourism gain.

In-depth interviews are a powerful means to comprehend the viewpoints of respondents (Rubin & Rubin, 2012). To understand the impact of tourism leveraging strategies on small-scale events, semi-structured interview questions were developed to guide the interviews (Yeo et al., 2014; Yin, 2014). These items included "Please describe how your event is leveraged for tourism gain," "How does your event benefit the region's tourism?" and "How have tourism leveraging strategies influenced or impacted your event?" The items provided the opportunity to probe and explicate the subject under investigation (Neuman, 2012; Yeo et al., 2014). The interviews ranged from 50 to 90 min, and each interview was digitally recorded and transcribed verbatim.

Small sample sizes are appropriate in qualitative research (Bryman, 2012; Creswell, 2013; Patton, 2002a; Ritchie et al., 2014). While there are no strict rules for sample size in qualitative inquiry (Patton, 2002b), the seven events represent events within a particular destination that received tourism grant funding through a particular initiative of a tourism organisation. Further, the sample size is consistent with McCracken (1988) who suggests that eight interviews are sufficient for the generation of themes and categories in qualitative research. Data saturation was reached as no new information was gained in the last interview.

4.4.2 Data analysis

An inductive process was used to identify themes (Glaser & Strauss, 1967). On completion of the data collection the two authors read the transcripts several times to become familiar with the data. Data were coded independently by each author to enhance reliability and then the authors conferred to refine the themes (Miles & Huberman, 1994). Consistent with the process of constant comparison, thematic coding was used to develop concepts and themes from the interview data through a process of open, axial, and selective coding (Corbin & Strauss, 2008). Open coding was used to identify overarching themes relating to the impact of leveraging strategies on small-scale events, thus allowing the authors to focus on the core phenomenon. Axial coding then followed, relating concepts/categories to each other by exploring causal conditions, identifying the context and intervening conditions, and delineating the consequences (Corbin & Strauss, 2008; Creswell, 2013). Selective coding further refined the relationships and interrelationships among the codes.

The authors conferred until there was mutual agreeance on themes and theme names. The authors referred to the raw data when disagreements occurred. To illustrate the coding process, one author developed a theme titled *grant funding as a diversion for event managers*. The other author developed a similar code titled *restrictions on grant funding excludes core activities*. When both authors convened to discuss the results, it was decided that this theme could best be described as *restrictions on funding as a diversion from core business*. The logic behind the coding example is further elaborated in Fig. 1. The results were used to develop a grounded theory model of how small-scale events are affected by tourism leveraging.

Quotes

"There are very specific guidelines in the contract that we get with them as to how the money must be spent."

Restrictions might be geographic restrictions. So funding might not be allocated for marketing initiatives locally, it might have to be outside the region. We have to reach outside the local region."

"The thing with a lot of events, particularly my event, is that the cost to put the event on is mostly time. It's mostly arms and legs. Emails, and phone calls, follow-ups, and people to bump in, and people to bump out. It's very, very labour-intensive.... None of the [grant] money goes into consolidated revenue, none of it goes to support the arms and legs that are actually doing the work. It's all got to be [spent] on tourism business growth, marketing, strategy development, business planning, all that sort of thing. Which is all fine, but frankly, if I didn't have the [grant] money for those things... I just wouldn't do [some of] them. So in other words, [the grant money is] not funding the core activities.... I understand the reason why they're doing that, because they're wanting to try and support you to get up to this level, I understand that, but my feeling is that ... it's a very borderline situation as to whether it's worth it.... I'm not interested in putting on an event just for tourism outcomes. That's not what I started this for."

Initial Codes

Guidelines on spending money

Restrictions on where money can be spent

Money must be spent on tourism. Not funding core activities/business.

Grant funding is diverting event managers from core activities

Final theme

Restrictions on funding as a diversion from core business

Fig. 1. Coding example.

Event	Tourism Leveraging	Effect of tourism leveraging on event

Adoption of tourism agenda

Diversion of event resources to tourism initiatives

Core purpose for which the event was initially created → Tourism grant funding from tourism organisations → Collaboration with funding partners

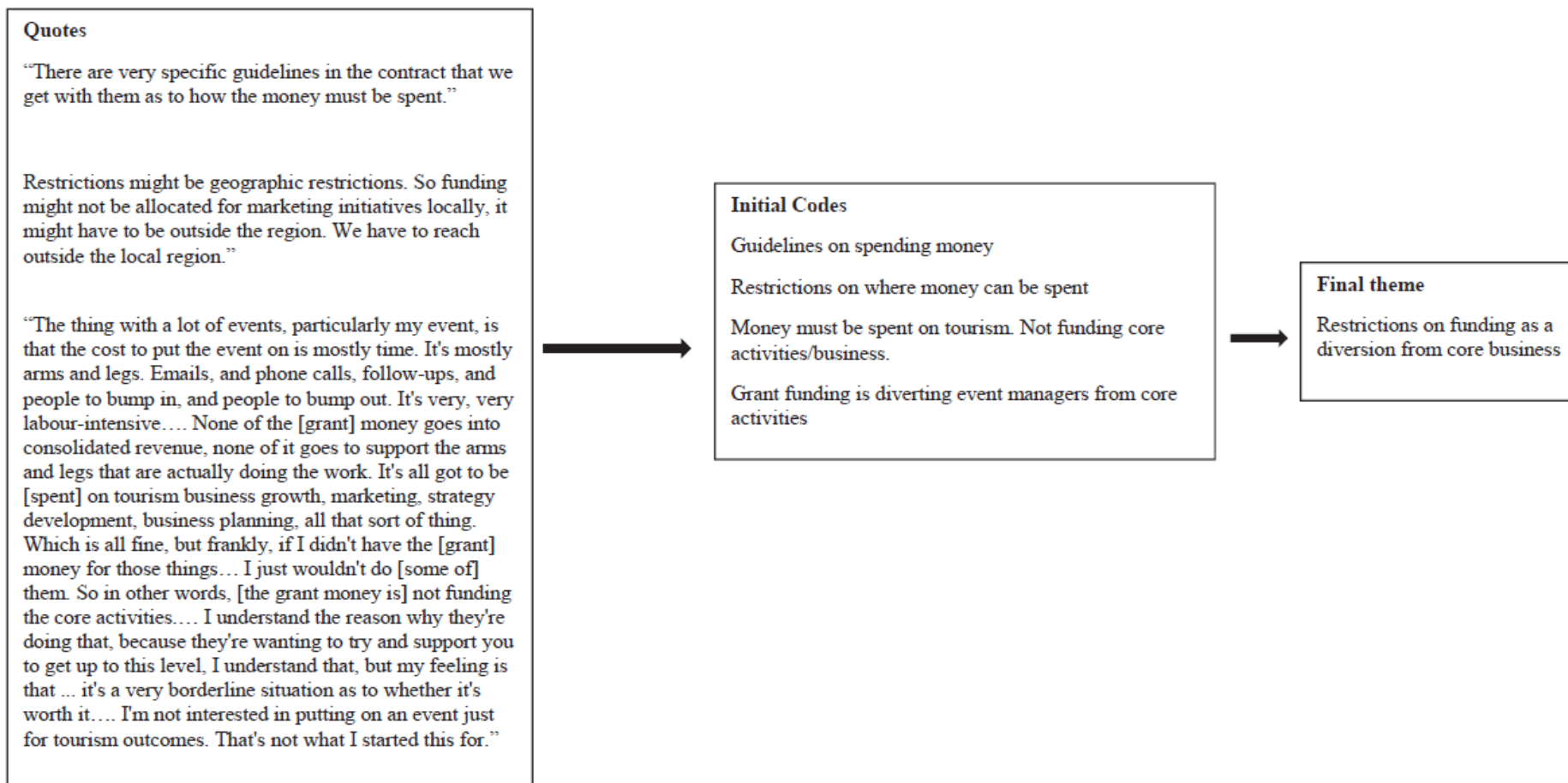Expansion of event programme

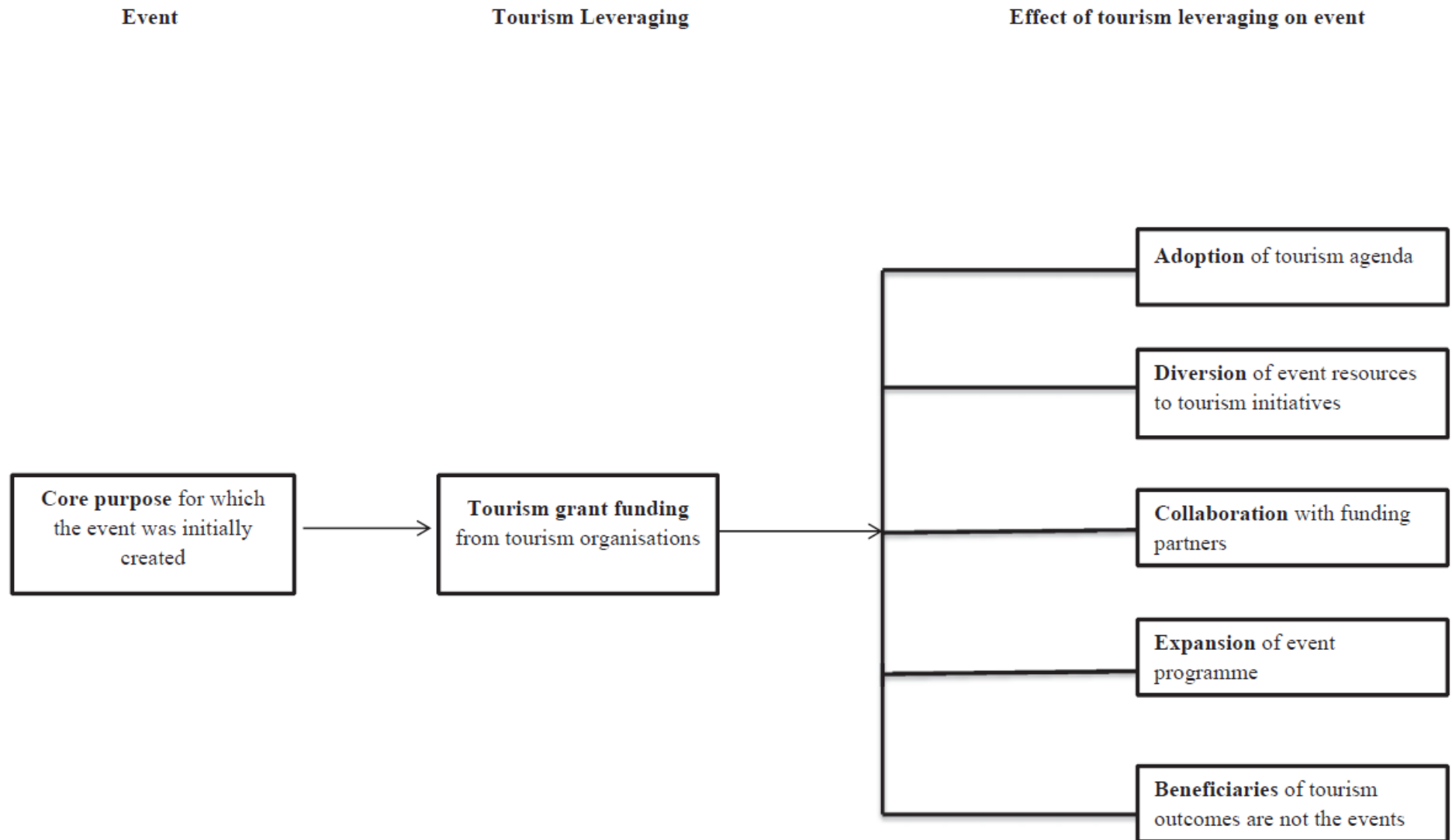Beneficiaries of tourism outcomes are not the events

Fig. 2. Effects of tourism leveraging strategies on small-scale events.

4.5 Results

From the coding process, the ways in which tourism leveraging strategies have an impact on small-scale events emerged in six key themes: the primary purpose of the event, adopting a tourism agenda, restrictions on funding as a diversion from core business, collaboration with funding partners, expanded event agenda, and beneficiaries of tourism outcomes. Below, we discuss each theme and illustrate it with representative quotations. Pseudonyms protect the identity of the event managers. Further, the results were used to develop a grounded theory model, which can be seen in Fig. 2.

4.5.1 The primary purpose of the event

Event managers consistently noted that the primary purpose of each event related to the interest or subculture that sparked the event's original activity or core. For example, the manager of an ocean swimming event stated, "We're really passionate about ocean swimming. That's why [the event] started, to get more people ocean swimming. To grow the sport" (Daniel). A manager of an active lifestyle event suggested, "Our main goal is around creating healthy lifestyles and promoting health and fitness" (Leah). Similarly, the manager of a surfing event stated:

> [The event] brings people to [the destination]. Part of the purpose is to bring surfers here to enjoy the experience. The event…was primarily, in my mind, positioned first and foremost as something by surfers, for surfers, to celebrate the fact that you can still [surf]…. Appreciate the environment, respect the environment and honour what's gone before. All these aspects [make] this…a culture, it's not just a sport. (Paul)

Note that in the quote above, the event manager began by discussing the benefit of the event for tourism – it brings people to the destination. However, the event manager then goes on to highlight that the event is not inherently about tourism, but about celebrating the subculture of surfing. The event manager himself is an insider in the subculture of surfing and created the event as an opportunity for the surfing community to celebrate the activity. Indeed, most of the events were founded by individuals who had a specific interest in the activity the event featured. For example, a food event in the region was established by an organic farmer. She stated:

> I ran an organic farm for quite a while, and I was involved with a lot of regional initiatives around this area. I became very aware that local food and food producers generally needed to get some support. It was really about supporting our local food producers. I started looking at what I could do… to make a difference.… What made sense to me was to have an event that brought everyone together from the food supply chain, so I know it's not tourism-specific, but it's where it [the event] kind of came from…. We [the event] celebrate food in

the local region; from farm to table, paddock to plate, seed to sauté pan, whatever you want to call it. (Judy)

Thus, the event originated primarily to support and celebrate local food producers and their product. Similarly, the manager of an arts and culture event noted that the main purpose of the event was to provide unique experiences in the genre. She stated:

> Per se I don't care about tourism. It's not the driver. The driver is to bring a wonderful product to the town, so the major driver is that we can bring fabulous events, fantastic performances, wonderful artists, amazing theatre experiences into [the destination] and the by-product is that the tourism trade benefits. Really what we're saying is that by producing this wonderful event which is a multi-cultural arts event – there's very few national events like us in Australia – it's quite a unique kind of event. That has always been the initial, primary, strategic objective, and so in that respect, we are slightly different [from] some other events who see themselves primarily as being strongly a tourism driver. (Janice)

In the above quote, the event manger repeatedly stressed that the most important purpose of the event was not tourism. Instead, the event was about celebrating the arts, with tourism as a by-product of hosting the event.

In summary, event managers emphasised that the primary purpose of their event was about parading and celebrating a particular activity. The activity was an interest that the event manager was passionate about.

4.5.2   Adopting a tourism agenda

While the principal purpose of each event was to celebrate a particular activity, all of the event managers referred to the need for external funding to ensure the financial viability of their events. One event manager put it this way:

> Events are expensive to run. We need [financial] support to be able to deliver the event to the standard that people are expecting, to make sure that we get repeat visitation and [that] we're attracting new people to the market as well. (Leah)

The availability of grants from tourism organisations offered one source of funding for events. Event managers noted that tourism funding was particularly relevant given their regional location:

> Any event or activity that is held in a regional area needs to draw participants from the main population source, which in essence is tourism…. If the same event is held in a metro

area we do not need to employ any tourism principles to drive participation. Funding is considered when developing a concept, but only as one of many revenue streams. (Daniel)

Although the events often were held principally to celebrate a particular aspect of the region, to secure grants from tourism organisations event managers needed to frame their event in terms of tourism goals and benefits:

> [Grant funding] probably makes organisers, ourselves included, look at the bigger picture. We're not just focused on getting people on the start line, it's about getting people to the region, and in turn if they enjoy their experience in [the destination] for a weekend, there's more of a chance of bringing their friends, family next year. It prompts us to look long-term, and look at our strategies long-term, it's not just about short-term gain. (Daniel)

Thus, while the event mangers all noted that tourism was not their core business, they realised that their events could benefit from tourism:

> [Tourism is] not what I started this for. But at the same time, it's in my best interest to consider the tourism element very carefully, because that's also how I can get more people to come to my event. But not only just for my personal benefit as the event organiser, but to expose the [regional] food products and my producers, and exhibitors, and other stakeholders to a fresh new audience. I've had to learn very quickly about [tourism], and I don't know very much about it…for it's not where I came from. (Judy)

Notice that in the above quote the event manager does not have background knowledge in tourism. Instead, the event manager had to learn about tourism because it opened up a new target market for the event. Another event manager put it this way:

> Clearly my event would not exist without tourism, because [even though] we do get locals…the majority of people that come to our event travel here. We get over forty percent that are inter-state and international, so tourism is extremely important for our event, which feeds back again to me in my job. Without that I wouldn't be in this job, in this role. I'm passionate about [the destination] in general, and [the destination] thrives on tourism. Without tourism, [the destination] really wouldn't exist. The majority of the income in this economy is tourist income, so I think that overall, is very important to me, and especially to our event.... Keeping our event going. (Sarah)

In summary, while the primary purpose of each event was to celebrate a particular activity, all event managers had also adopted a tourism agenda because of the availability of grant funding.

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However, the event managers came to realise that their events could benefit from tourism by opening up new target markets through promotion of the event, especially since the economy of the region in which the event managers are based relies heavily on tourism.

4.5.3 Restrictions on funding as a diversion from core business

Event managers noted that the tourism organisations placed restrictions on how the grant funding could be spent. One event manager noted, "There are very specific guidelines in the contract that we get with them as to how the money must be spent" (Sarah). These guidelines often related to activities that are aimed at generating tourism. One event manager put it this way: "Restrictions might be geographic restrictions. So funding might not be allocated for marketing initiatives locally, it might have to be outside the region. We have to reach outside the local region" (Daniel). While the event managers acknowledged that the tourism-related guidelines were appropriate since they were seeking funding from tourism organisations, they also noted that the guidelines inhibited their event-related spending:

> There are a number of restrictions usually placed so you can't use the money for payment of staff. You can't use it for certain administrative returns. Those are all set out in the grant applications. With [local tourism organisation] they have specified pretty well half of the money must go to specific marketing and activities that they approve. We can't spend it any other way except what they approve…. They're very tight. They're pretty tight on their restrictions. (Janice)

As the quotes above show, the event managers could not use the funding to support the day-to-day operations of their event. Event managers also noted that they were time-poor and that they believed the funding would be better spent if it were directed to the core activities required to stage the event:

> The thing with a lot of events, particularly my event, is that the cost to put the event on is mostly time. It's mostly arms and legs. Emails, and phone calls, follow-ups, and people to bump in, and people to bump out. It's very, very labour-intensive…. None of the [grant] money goes into consolidated revenue, none of it goes to support the arms and legs that are actually doing the work. It's all got to be [spent] on tourism business growth, marketing, strategy development, business planning, all that sort of thing. Which is all fine, but frankly, if I didn't have the [grant] money for those things… I just wouldn't do [some of] them. So in other words, [the grant money is] not funding the core activities…. I understand the reason why they're doing that, because they're wanting to try and support you to get up to this level, I understand that, but my feeling is that ... it's a very borderline situation as to whether it's

worth it…. I'm not interested in putting on an event just for tourism outcomes. That's not what I started this for" (Judy).

The event managers saw grant funding as a diversion, changing their focus from staging an event to producing tourism outcomes. Indeed, the event managers viewed the grants' restrictions as pulling them away from the primary purpose for which the core event activity was initiated.

The grant restrictions were not the only influence diverting event managers from their core business, as the application process itself was also burdensome. Event managers noted that applying for funding was a time-consuming and resource-intensive process, and that post-event reporting on the uses of the grant funding was also onerous. One music event manager noted that "[it is] an extensive process in filling out application forms…we have to go through to receive funding from the [tourism organisation]" (Kathy). The event managers had to apply for funding each year as tourism organisations "don't do multiple-year contracts, so you just have to apply each year" (Sarah). Thus, event managers viewed the effort required to receive funding as a significant undertaking. Additionally, on completion of the event, the event managers were required to acquit the grant by reporting on the funded activities and the expenditures of grant monies. They also found the acquittal process to be labour-intensive, with one event manager stating that "the acquittal process is a nightmare" (Judy).

In summary, event managers found that the process of applying for and acquitting the grant by reporting on the activities they engaged in to adhere to the grant's directives distracted them from the core business of staging their event.

4.5.4   Collaborations with funding partners

Even though event managers stated that complying with the grant funding requirements side-tracked them from their core business, they acknowledged that they benefitted from engaging in collaborative efforts with the funding partner. Event managers noted that the tourism organisations that provided grant funding were increasingly collaborating with the event managers to cross-leverage the event and destination. One event manager put it this way:

It is becoming more apparent that [tourism organisations] are becoming more and more involved. They are looking at more and more ways of leveraging from our event, which is something that I think in the last two years has become more apparent, but even in the last twelve months [they] have become a lot more involved in just even discussing…any marketing opportunities, and they were feeding off our social media network pages, and just speaking to us about ways in which they could get involved…. They have been leveraging off

our event for beautiful imagery to promote [the destination], and not just [the destination] but [the region], and they are taking advantage of that more and more (Sarah).

Another event manager described how she and her staff worked closely with the local tourism organisation:

> We work very closely with [the local tourism organisation]. They are a funding body of ours, so we do a lot of cross-promotion, which promotes the event in the destination. The triathlon is as popular as it is partly because of its location. [The destination] is a beautiful destination, and if you ever want to come here for a holiday, the triathlon is a good excuse to do that. We work closely with them in tagging to some of their broader national campaigns that they have going as well…. [It] opens up [and] gives us access to people and databases that we may not have access to… it really helps us just hit a wider audience than what we can probably do through our own direct marketing. (Leah)

Thus, event managers who actively engaged with the tourism organisations and cross-leveraged the event saw mutual benefits in the relationship: "[The benefits] largely come down to marketing... it's generally through, sort of various marketing opportunities that…we leverage off each other". (Leah)

However, some event managers felt that more could be done to foster reciprocal benefits between the events and the tourism organisations:

> Without our events, a region is difficult to promote. I think events provide tourism organisations with the perfect platform. You can hang really good campaigns off events, particularly coastal events. Again, I would like to think that events could have more input into development of longer-term strategies around campaigns. (Judy)

One event manager saw the collaboration working in this way:

> I actually think that the needs [of regional events] that we see are the assistance to help with the targeting into specific markets, and to do that in quite a collaborative sit-down way. *"How can we work with you?"* That often can be just helping even to bring up some journalists to town, or to do a media [familiarisation trip] that will result in more interest occurring. (Janice)

Benefits are maximised when the event and tourism organisation (i.e., funding partner) collaborate in mutually beneficial cross-leveraging. Event managers who do not believe that the

relationship between the event and tourism organisation is equal and reciprocal seek greater collaboration.

4.5.5 Expanded event agenda

Efforts to satisfy the tourism-related grant funding result in changes to the structure of the event to foster tourism benefits. For example, one event manager described how the event had expanded:

> [Our participants] want to come and take part in the event, but they're looking for more than just an event to swim in, or surf at, or cycle in. We know that they're looking for a whole weekend of activities. Yeah, so it's in our best interests if we get people to the event…to stick around and do other things. It's about the whole experience, not just what they do at our event. (Daniel)

Note that the event manager discusses expanding the programme of the events to encourage extended stay within the region. Another event manager put it this way:

> We have five days of different events, so we have everything from a golf day to a fun run to a kids' triathlon, a special triathlon for people with mental disabilities. We have an ocean swim, we have about ten or eleven different sporting events, and then the triathlon sort of culminates everything on the final day.… That's sort of why we've grown from a one-day event into a five-day festival, to encourage people to come up and to spend more time.… We extend the programme to make sure there's something for people to do, over several days rather than just one. Then we also make sure there's something that the whole family can be a part of.… We also directly target areas outside of [the destination]…, so that [tourists] do need to spend two or three or more nights in [the destination]. (Leah)

As the above quotes show, event managers were expanding their event to attract different target markets, especially individuals outside of the region – resulting in an increased number of tourists and an extended length of stay. While some event managers had increased the number of activities that formed the event, others noted that the event expanded as a result of considering the tourism potential:

> The first year was just a one-day event… we had a really big response. And then I was encouraged for the next one, to turn it into a two-day event.… To be honest, I didn't really think of it as a tourism event, a tourist-based event. Obviously we wanted to encourage the public to come, but I didn't look at it in terms of tourism. But very quickly, especially with

the second year, we realised that this event had very strong tourism potential, and particularly for agritourism, culinary tourism, and people interested in food prevalence. (Judy)

Adopting a tourism agenda thus resulted in changes to the event, in particular, consideration of additional target markets and expansion of the event to increase the number of tourists and the length of stay in the destination.

4.5.6 Beneficiaries of tourism outcomes

As noted above, event managers stated that adopting a tourism agenda shifted their focus away from their core business. They observed that the key beneficiaries of the event were the local stakeholders in the tourism industry. One event manager described the key beneficiaries this way: "Definitely local accommodations, cafes and restaurants for sure, all sort of benefit from the increase number of the people in town" (Leah). Another manager stated:

> [Main] Street people, the restaurateurs and the businesses along [Main] Street, they've been really embracing…what we're doing. I think they can see the greater good in that if the festival is successful it's going to have a natural flow-on benefit to them. They absolutely reap the economic benefit from the festival…. The economic benefit is definitely seen by the [destination] community. (Kathy)

As the above quotes show, event managers believed that the local tourism-related businesses benefit from the event. Another event manager described the benefits this way:

> [The local tourism organisation], number one, and [the state tourism organisation], because obviously not only does the event bring people into town to spend money in the economy, but it promotes [the destination] as a highly sought-after surfing destination. I'd say [the local tourism organisation], and [the state tourism organisation], probably tend to be the big stakeholders, but they're also the ones that benefit the most in terms of marketing these destinations. Then you'd have to say that the accommodation houses probably benefit most, because they do book out, and I speak to them regularly. A lot of them do support the event in terms of donating accommodation. There unfortunately are some that reap the rewards so much that they're fully booked and they don't even donate accommodation anymore, which is really hard to combat, and this year we've felt that more than ever. We've had a couple of accommodation houses that previously used to be extremely supportive and donate quite a lot of rooms, and they're just not being able to do so because they're already fully booked from the year prior. (Sarah)

Note that the event manager describes the efforts to increase tourism around the event as successful, but that success means that the event no longer receives support in terms of complimentary rooms from some of the accommodation providers. Thus, the benefits that local tourism operators gain from the tourism generated by the event may ultimately detract from the ability of the tourism operators to provide benefit to the event.

While all event managers noted that the tourism organisations and businesses were the key beneficiaries of the event, some also noted that not all the benefits were contained locally:

> The tourism industry benefits enormously from all of this because of buying accommodation and the whole thing. Things like the airline.… Accommodation is an interesting one because the people who own the accommodation and there's a… corporate manager who runs all the units, but the people that own it at Melbourne, Sydney, are all international. They benefit from it because they get rent. The actual money that stays in town is a small percentage of the total amount paid. (Lindsay)

Note that while the event manager describes the tourism industry as benefiting from the event, he notes the leakage of funds from the local economy.

In summary, event managers noted that the primary purpose of staging their events was to celebrate a subculture around a particular activity. However, to receive tourism grant funding the events adopted a tourism agenda. Applying for and acquitting the grant funding proved to be a labour-intensive process that diverted managers' attention from the core business of staging the event. Additionally, the restrictions placed on how funding could be spent limited the ways in which the event could be executed. Some event mangers engaged heavily in collaborations with the tourism organisations that provided grant funding and viewed these collaborations as a success – especially as they expanded target markets for the event managers. However, other event managers felt that the tourism organisations were not providing the support and advice that they needed to enlarge their event. Although by adopting a tourism agenda the events expanded their product offerings and target markets and lengthened the duration of the events, all event managers believed that the tourism organisations and businesses were the key beneficiaries of the event leveraging strategies.

4.6   Discussion

4.6.1   Leveraging strategies' effects vary with event size

While the premise that events can be used as a leverageable resource to generate tourism outcomes still applies for small-scale events (Beesley & Chalip, 2011; Chalip, 2002, 2004), efforts to leverage small-scale events can alter the direction and scope of the event itself. The findings were used to develop a grounded theory model that explains the impact of leveraging strategies on small-

scale events. Using strategies that encourage the event manager to exploit the event for tourism gain may divert the event manager from the core objective of running the event. This effect is unlikely to occur with mega-events such as the Olympics because organising committees remain separate from efforts to leverage the event for tourism, whereas the core focus of the small-scale event manager is to stage an event to bring together an audience that is interested in that core activity.

Small-scale events are often created by individuals who have an interest in a particular activity and use the event as a means to celebrate that particular activity or identity. This finding is consistent with research that showcases events as vehicles for parading and celebrating the norms and rituals of a particular subculture (Donnelly & Young, 1988; Green & Chalip, 1998; Green, 2001) or social world (Unruh, 1980). Indeed, event managers were all insiders with respect to the activity on which the event was based, be it a particular sport, a particular genre of music, or the arts (Donnelly & Young, 2005).

4.6.2 Grant funding diverts attention from events' core purpose

Event managers increasingly seek funding opportunities, including grants and sponsorships, to enhance the viability of their event (Lamont & Dowell, 2008; Molloy, 2002; Whitford, 2005). Tourism organisations offer grant funding as part of an initiative to leverage events to increase tourism (Lamont & Dowell, 2008) and integrate events into their destination marketing strategies (Jago et al., 2003). While grant opportunities offered by tourism organisations can be an attractive revenue source for event managers, applying for and subsequently administering and acquitting a tourism-related grant diverts event managers from the core activity of staging the event.

This diversion occurs in three ways. First, providing event managers with grant funding based on tourism leverage places the onus of leveraging the event for tourism gain on the event managers themselves. Second, to comply with the grant rules and regulations, the event manager must redirect time and resources away from the core business or activity around which the event is centred. Third, the structure of the event and the event product change as a result of adaptations that are made to generate tourism benefits. Tourism benefits ensue, but the prime beneficiaries are often the tourism operators within the destination rather than the event.

The diversions are akin to mission drift, which is when an organisation's activities are no longer congruent with its core mission (Copestake, 2007; Weisbrod, 2004). Similar to its impact on non-profit organisations (Augsburg & Fouillet, 2010), conditions associated with grant funding may place undue pressure on events to focus on external objectives. Mission drift is thought to be severe when a secondary goal is overemphasised at the expense of the *raison d'être* (Ebrahim, Battilana, & Mair, 2014). While it is unrealistic to expect organisations to forgo grant funding opportunities (Jones, 2007), events should be made aware of the potential diversions away from their core mission that may occur when adhering to the conditions of grant funding.

4.6.3 Effects are contingent on event-related factors

As contingency theory suggests, the components of a solution or strategy depend on the specific circumstances of the organisation (Otley, 1992; Van de Ven & Drazin, 1984). That is, events do not exist in isolation, but instead operate in an environment with other actors that have the ability to influence each other (Håkansson & Snehota, 1989). In the management literature this mutual influence is termed the organisation–environment interface (Burns & Stalker, 1961). Through interactions within an environment, the meaning and roles of the organisation may shift toward the goals and objectives of another party (Håkansson & Snehota, 1989). Consequently, the allocation of the organisation's resources shifts (Brown, 1984; Håkansson & Snehota, 1989). Applying for and receiving grant funding focused on tourism leveraging shifts the focus of the event to include the goals of the tourism organisation – to use the event as a means to generate tourism. Event managers reallocate time and resources to apply for funding, and consequently develop a set of objectives that are based on the restrictions placed on the spending of the funds. The new objectives are then adopted as part of the event agenda. In this process, the core business of the event alters to include the objectives of the tourism organisation. Specifically, the event agenda moves from focusing on running an event in celebration of a core activity to marketing destinations for tourism gain.

4.6.4 Collaboration is critical

While continuous organisational change and the ability to change are crucial capabilities of organisational survival (Eisenhardt, 1989), the changes adopted by event managers are not tactics they have carefully considered. Instead, the changes are the direct result of the stipulations on how grant funds can be spent. The process of event leverage should be consultative, coordinated, and collaborative and should be driven by analysis, weighing costs and benefits and selecting outcomes that are the best fit for the event and the destination (Ziakas, 2014a). Event leveraging requires the active participation of multiple stakeholders, who often have competing agendas (Chalip, 2000; Misener, 2015; Smith, 2009; Stokes, 2006). The tourism organisations' providing of funding could be viewed as latent coercion, since the funding manipulates the event managers to make certain changes to their event that are not congruent with the core focus of the event. A common assumption is that stakeholders collaborate voluntarily and share common goals and equal power (Hardy & Phillips, 1998). However, by serving as a funding source, tourism organisations are able to impose their objectives on the event managers. When organisations expand to include activities that are not central to their existence, substantial managerial effort is often required (Penrose, 1959). For example, expansion comes with its own complexities, such as an increase in the administrative and managerial tasks associated with the expansion (Penrose, 1959). Indeed, event managers noted that focusing on the tourism benefits often took them away from other tasks that were essential to the actual staging of the event.

The relationship between a tourism organisation and an event is useful when collaboration and co-branding occur (Dredge, Ford, & Whitford, 2011; Hede, 2008; Jamal & Getz, 1995; Stokes, 2006). To establish and develop this framework of relationship, inter-organisational relationships must have a "mutual orientation" (Ford, Hakansson, & Johanson, 1986), which is achieved through "active and reciprocal involvement of both parties" (Håkansson & Snehota, 1989, p. 191). Collaborative efforts are key to successful leveraging (Ziakas, 2014b), as a leverage strategy requires a cross-functional team (O'Brien & Gardiner, 2006) and co-ordination among various stakeholders (Misener, 2015; Smith, 2009; Stokes, 2006). Event managers who perceive that equal and reciprocal benefits are received are satisfied with the relationship. However, where the manager perceives the relationship as one-sided, primarily producing benefits for the tourism organisation, the relationship and the need for the grant funding are questioned. One-sidedness is often perceived when collaborating partners have different goals and values (Waddock, 1989) or when the distribution of power is unequal (Gray & Hay, 1986).

Importantly, integrating the objectives of the tourism organisation changes the event itself. Events often seek new target markets that generate tourists, and add extra activities to increase visitor stay and spending (Mules & Faulkner, 1996; Telfer & Wall, 1996). These benefits are consistent with those expected when leveraging events for tourism gain (Chalip, 2004). While event managers assume the risk of producing the tourism outcomes, the tourism-related businesses in the region often benefit (Brown, 1984).

4.7 Limitations and future directions

The results of this study were derived from an analysis of small-scale events in one particular region. The events within the region were encouraged to engage in tourism leveraging through grant funding opportunities provided by the local and state tourism organisations. As the findings here suggest, grant funding significantly influenced the event managers to engage in tourism leveraging. As the event managers reported, the process of applying for and acquitting the grant funding, along with the grant funding rules and regulations, significantly influenced the activities of the event managers. Further types of tourism leveraging for small-scale events should be examined in other regions and under different funding or no funding conditions.

The research was also conducted at one particular time. Longitudinal research could examine how tourism leveraging strategies change small-scale events over time and also explore how adopting a tourism focus can influence the event over time. Further, the current research examined multiple types of events (sport, music, the arts). Future research should examine whether the adoption of tourism leveraging strategies differs with the type of event.

While previous studies of event leveraging have focused on the tourism outcome and the impact of leveraging strategies on the tourism system, this research highlights the importance of considering the impact of those strategies on the events themselves. Rather than viewing the event as seed capital for tourism gain, further research should consider the impact of leveraging strategies on event managers as a key stakeholder. This study considered tourism leveraging strategies from the perspective of the event managers. It would be useful to consider the perspective of the tourism organisations as the agencies that provide the impetus for tourism leveraging.

Finally, this research also highlights that tourism leveraging may have negative implications when the strategies are not collaborative efforts involving all stakeholders. Future research should consider potential negative outcomes of leveraging events for tourism gain.

Contribution

Donna designed and conceptualised the study, collected data, and led the analysis of the data. Donna also drafted the first version of this paper.

Sheranne revised and rewrote subsequent versions of the paper.

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CHAPTER 5 -   PAPER THREE

The utility of relationships in the creation and maintenance of an event

portfolio

5.1 Abstract

Purpose – Event portfolios promote synergies among events and stakeholders within a destination in order to maximise resources. The purpose of this paper is to examine the role of relationships in the creation and maintenance of an event portfolio using the four stages of Parvatiyar and Sheth's (2000) process model of relationship marketing: formation, management and governance, performance evaluation, and evolution.

Design/methodology/approach – Nine semi-structured interviews were conducted with tourism and government stakeholders involved in the creation and maintenance of an event portfolio within a single destination.

Findings – The destination outlined clear strategic goals through an event strategy. An Events Board was established to bring together key stakeholders from tourism, events, and government to oversee the development of an event portfolio. The Events Board gave advice to relevant tourism and government stakeholders on which events they should provide funding. Developing relationships was not a stated objective, but the Events Board realised the importance of relationships to create and maintain the destination's event portfolio. Long-term funding contracts were used as a mechanism to establish relationships and were an impetus for interaction. Relationships were also maintained through dedicated staff who managed the relationships between the destination stakeholders and the events.

Practical implications – Understanding factors that contribute to the successful creation and maintenance of event portfolios can inform destination stakeholders who are responsible for generating tourism through events.

Originality/value – Limited research has examined the creation and maintenance of event portfolios. This study provides insight into the central importance of relationships in creating and maintaining and event portfolio.

Keywords Tourism, Relationship marketing, Events, Event leveraging, Event portfolio

Paper type Research paper

5.2 Introduction

Destinations explicitly use events to drive tourism (Misener, 2015). While research has primarily focussed on creating benefits from single events, destinations are now adopting an approach that regards a strategic selection of events within a region as a portfolio (Getz, 2008; Ziakas, 2010; Ziakas, 2014). Event portfolios shift the focus from single events to an integrative approach where synergies among events are identified and cross-leveraged (Chalip, 2004; Getz, 2008; Ziakas, 2010) for tourism, social, cultural, or policy goals (Ziakas & Costa, 2011a, 2011b). Further, destinations make strategic decisions about the events within the portfolio based on their fit with the destination and their ability to generate synergistic benefits (Getz & Page, 2016).

Despite the benefits of event portfolios, we know little about how they are managed (Getz & Page, 2016; Ziakas, 2014). The limited empirical research that exists has highlighted the need for collaboration among diverse stakeholders (Ziakas, 2010; Ziakas, 2013b; Ziakas & Costa, 2011b). This research examines how relationships among key destination stakeholders are developed and maintained through creating and managing an event portfolio. Drawing on Parvatiyar and Sheth's (2000) process model of relationship marketing, the study examines the role of relationships in the creation and maintenance of event portfolios. Understanding how relationships can facilitate the effective creation and management of event portfolios has important implications for destination and event managers.

5.3 Literature review

5.3.1 Event portfolios

Like financial portfolios, event portfolios seek to manage risk through diversification (Markowitz, 1952). By selecting the most suitable assets to be included in a portfolio, the investor enhances prospects of improved performance and higher yield (Markowitz, 1952). However, it is important to note that events are socio-cultural constructs. Therefore, the higher yield may not be defined in financial terms. Instead, various objectives and outcomes that value social and cultural benefits may be considered alongside, or even above, financial outcomes (Ziakas and Costa, 2011a, b). Taking this view, destination stakeholders can methodically target, evaluate, and develop events that provide maximum value to the destination (Getz, 2008). Event portfolios are therefore defined as "the strategic patterning of disparate but interrelated events taking place during the course of a year in a host community that as a whole is intended to achieve multiple outcomes through the implementation of joint event strategies" (Ziakas, 2013a, p. 14). Some authors have used organisational ecology to understand how to use an event portfolio, or the similar concept of event population (Andersson *et al.*, 2013; Getz & Andersson, 2016). This approach suggests that how other events within the portfolio impact the viability of a single event, and how a sustainable portfolio of

events can be maintained and measured should be key considerations for those managing event portfolios.

When developing an event portfolio, organisers should consider the functionality of events in achieving economic, tourism, or political goals (Getz & Page, 2016). The mix of events in the portfolio should reflect diversity in genre, size, and season, thereby appealing to an array of target markets (Ziakas, 2014). Reach, frequency, and the scheduling of events within a portfolio should also be considered (Ziakas, 2010), as an event portfolio can be used to offset seasonality by staging events throughout the year (Chalip, 2004). Further, the effects of any new events on the existing portfolio should be taken into account (Ziakas, 2010).

A two-year ethnographic study in the town of Fort Stockton, Texas, USA focussed on nine different events within the community (Ziakas, 2010; Ziakas & Costa, 2011b). Three themes emerged within the event portfolio: event relatedness, leveraging opportunities, and event portfolio implementation. Event relatedness referred to the functional interconnectedness of events and included volunteer pools, markets, and experiential capacity. Individuals volunteered for multiple events, and there was complementarity in target markets across events including tourism markets and local families. In addition, the community shared knowledge and experience of running events within the community, facilitated either by personnel being involved in multiple events or through event replication. However, while the events were connected through common objectives and shared resources and the local governmental structure enabled resource sharing and coordination, strategic planning was not utilised and therefore opportunities for cross-leverage were missed. While no formal strategy or coordinating entity guided the event portfolio, organic relationships and interrelationships formed (Ziakas, 2010).

While Fort Stockton's event portfolio was not formally organized, the events were interwoven into the social fabric of the local community (Ziakas & Costa, 2011b). The planning and implementation of events relied on "intuitive ad hoc efforts" rather than systematic strategies. The Fort Stockton studies suggest that interrelationships are key to leveraging event portfolios and that a formal policy that creates and manages cooperation among key stakeholders would be useful to achieve planned outcomes (Ziakas, 2010; Ziakas & Costa, 2011b).

Pereira *et al.* (2015) examined an event portfolio of six nautically themed events in the Algarve, Portugal that promoted the development of tourism. Poorly defined goals, a lack of specific strategies, and a lack of coordination led to leveraging inefficiency. In keeping with the focus of the official contracts between the destination and the event, economic goals were a clear focus but social goals were not.

Examining a sport event portfolio in London, Ontario, Clark and Misener (2015) applied Ziakas and Costa's (2011a) event portfolio framework that includes event relatedness, social and

human capital, grounding logic, and authenticity, and identified two additional themes – timing and political grounds. Clark and Misener (2015) demonstrated that successful event hosting was a primary catalyst for creating the city brand, although this was purely coincidental and not the result of any strategic effort.

When leveraging events and event portfolios, stakeholders must collaborate and work in synergy (Chalip, 2014; Ziakas, 2014). However, stakeholders often have different goals and competing agendas (Ziakas, 2014; Ziakas & Costa, 2011a), or may not work effectively together (Weed, 2003). The event portfolio approach requires the development of relationships among events as well as with the destinations in which they are hosted (Ziakas, 2010). Therefore, how relationships are formed and maintained in managing an event portfolio are important considerations.

5.3.2 Process model of relationship marketing

Relationship marketing aims to enhance the value for the parties involved, thereby increasing marketing productivity and ultimately profitability (Gronroos, 1990; Parvatiyar & Sheth, 2000). Relationship marketing is "the ongoing process of engaging in cooperative and collaborative activities and programmes with immediate and end-user customers to create or enhance mutual economic value at reduced cost" (Parvatiyar & Sheth, 2000, p. 9). This conceptualisation of relationship marketing highlights the importance of collaborative relationships that lead to the creation or enhancement of economic value.

Parvatiyar and Sheth (2000) propose a four-stage process model of relationship marketing that emphasises the process involved in forging collaborative relationships. The four stages include formation, management and governance, performance evaluation, and evolution. O'Brien and Gardiner (2006) used this model to understand how non-host cities leverage pre-Games training for the 2000 Sydney Olympic Games.

Formation. The formation stage refers to decision making that must occur to engage specific individuals in a collaborative partnership for a specific purpose (Parvatiyar & Sheth, 2000). This stage includes defining the purpose and objectives of engagement, selecting partners to be involved, and developing strategies to drive the direction of the group and enhance partner engagement. Also included are decisions about who is involved in the process and how relevant stakeholders will be involved to maximise engagement opportunities (Parvatiyar & Sheth, 2000). Event portfolios are often designed to achieve destination tourism objectives. Partners are selected from the destination to form the governance committee to oversee construction of an event portfolio. For example, O'Brien and Gardiner (2006) viewed the formation phase in terms of understanding exchanges among key stakeholders from sport, tourism, and government who were involved in pre-Games training for the Olympics.

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Management and governance. The management and governance phase includes role specification, communication, planning, operating processes, human resources, and the development of monitoring systems – all designed to keep relationships progressing toward group goals. Establishing an event portfolio requires a diverse network of stakeholders who may have competing agendas, necessitating considerable coordination. Diversity may be evident in the genre of events, the objectives of individual event organisers, and the tourism and business stakeholders involved in the event portfolio (O'Brien, 2006). However, the purpose of the event portfolio is to maximise the use of resources through synergies and collaborations. As events included in an event portfolio should strategically benefit the destination (Chalip, 2017; Ziakas, 2013a), the destination should assess what each event actually contributes. Further, structures should be established to facilitate networking opportunities to encourage collaboration and potentially enduring relationships among stakeholders (Chalip, 2004; Chalip & Leyns, 2002; O'Brien & Gardiner, 2006). Thus, networking and relationship development should be treated as a key component of management and governance.

Performance evaluation. Performance evaluation involves periodic assessment of the outcomes of the relationship marketing activities (Kennerley & Neely, 2003). Evaluation of actual performance against planned outcomes is an essential feature of an appraisal system. Programme appraisals should assess whether objectives are being met and used to inform decisions about continuation, modification, or termination of relationship marketing programmes (Parvatiyar & Sheth, 2000). Since event portfolios are intended to maximise benefits to the destination by sharing resources and cross-leveraging (Ziakas, 2010), the combination or composition of events within the event portfolio should be frequently assessed against the destination's objectives. Relationships among events should be evaluated and strategic intervention should then ensure maximisation of the relationship marketing programme.

Evolution. Relationship marketing programmes are likely to evolve over time (Bedeian & Zammuto, 1991), either through pre-planning or natural occurrence. The relationship's ability to meet objectives is likely to influence stakeholder satisfaction and the evolution of the relationship marketing programme. When performance is satisfactory, the parties are more likely to be motivated to continue or enhance the relationship marketing programme. When performance is below expectations, parties may contemplate termination or modification of the relationship. Importantly, strategies to ensure the continued sustainability of mutually beneficial relationships may be key to achieving long-term objectives (Ahmed *et al.*, 1999). This investigation uses Parvatiyar and Seth's (2000) model to understand the role of relationships in the formation and maintenance of an event portfolio. Thus extending O'Brien and Gardiner's (2006) application of this model to understanding leveraging of a single event.

5.3.3   Method

To examine the role of relationships in the formation and maintenance of event portfolios, an exploratory case study method was used (Yin, 2009). A single case study is useful as it allows a thorough description of the phenomenon under study, which provides insight into causal factors (Eisenhardt & Graebner, 2007). The single case study took place in one region in Australia. Face-to-face interviews were conducted with nine stakeholders involved in the formation, management, and maintenance of the region's event portfolio. Semi-structured questions guided the interviews (Yeo *et al.*, 2014). Examples of the interview questions include "What role do events play in meeting the tourism objectives of the destination?", "How are events used to meet your organisation's goals?", "Can you give some examples of successful leveraging or cross-leveraging?", and "What has made those relationships successful?" Interviews ranged from 70 -100 minutes and were digitally recorded and transcribed verbatim.

To enhance reliability, both authors read the transcripts several times and worked independently to determine the initial open codes (Strauss & Corbin, 1990). The authors then discussed and refined themes to reach agreement (Miles & Huberman, 1994). As the coding strongly resembled a relationship marketing framework, the authors recoded the data according to Parvatiyar and Sheth's (2000) relationship marketing model: formation, management and governance, performance evaluation, and evolution.

5.4   Results

The discussion below provides illustrative quotes for each of the stages. To protect respondents' anonymity, generic position titles are employed. Respondents were decision-makers and senior executives of tourism and government organisations, and the quotes below came from representatives of: a regional council (RCR), a state tourism organisation (STOR), a local tourism organisation (LTOR), a local government (LGR), and a destination marketing organisation (DMOR). A summary of the results is presented in "The role of relationships in the creation and maintenance of an event portfolio".

The role of relationships in the creation and maintenance of an event portfolio:

(1) Formation:

- establish an event strategy outlining clear strategic goals;
- establish an Events Board through bringing together key stakeholders; and
- Events Board mandate: to provide guidance on funding allocation to events based on the goals of the event strategy.

(2) Management and governance:

- establish long-term contracts as relationship builders;

- encourage collaborations among stakeholders (including event, tourism, business, and government stakeholders);

- dedicate staff to maintain relationships with event managers; and

- engage the community through local business leveraging.

(3) Performance and evaluation:

- evaluate whether the key objectives (e.g. using an event portfolio to increase economic and tourism outcomes) are being met;

- evaluate the performance of each event within the portfolio;

- evaluate the performance of the overall portfolio; and

- evaluate the diversity of events within the event portfolio.

(4) Evolution:

- adapt the strategy to address deficits within the event portfolio;

- create opportunities that lead to greater collaboration among stakeholders; and

- enhance and modify the event strategy and portfolio to maximise attainment of strategic goals.

5.4.1 *Formation*

Key destination tourism and event stakeholders noted the utility of events as generators of tourism:

> [A]bout 50% of domestic travellers choose to come to a region because of what's on […] [such as] sporting events, cultural events, and music events […] events are very central to a number of our regional tourism activities (RCR).

The destination, including the STOR, sought to develop strategies to maximise the benefits to the state or region:

> [O]ur mission [is] to basically create a tourism marketing platform, as well as an events portfolio that will bring tourists into [the State] to then disperse across [the State] to grow the economy from an events strategy (STOR).

These quotes demonstrate that the region views events as a catalyst for tourism and economic development. To note the strategic importance of events, the region developed a 38-page written event strategy, which was followed by the formation of an Events Board to enact and direct the strategy:

> We created the Events Strategy in conjunction with the Events Board. [I]t's without doubt the most important tool in creating the event space […] along with the Events Board. The creation of the Events Board has really taken us to the stratosphere with events space, but creating the strategy first so that the Board and Council can implement that, was a pretty powerful tool. I don't know if many other regions across the country have actually got an events strategy (LGR).

The Events Board was formed by bringing together stakeholders in the destination who had knowledge and expertise in events and tourism:

> [M]y idea [with the Events Board] was to get the professionals in that [event and tourism] space to actually be the decision-makers and make recommendations to Council to vote on. Give it to the commercial operators and the people with that wealth of knowledge and experience, rather than Councillors who really […] don't have a specific knowledge on event attraction and event operation (LGR).

The Events Board therefore comprised "nine people, all experts in the fields involved with tourism, event operators, Council [and] event owners that all come together and we're actually out there […] creating the space where we attract and enhance [events]" (LGR). While the strategy provided purpose and direction to guide the board, the formation of the board created opportunities for collaboration among relevant event and tourism stakeholders. The Events Board is therefore at the epicentre of the events portfolio.

The development of the portfolio is largely determined by the Events Board advising which events should be given funding and support:

> [In assessing funding applications] we look at the mix, the spread and the relevance [of events]. We have key criteria – must attract interstate visitation; must align with the brand of [the destination]; must have the capacity to generate positive media – those sort of key elements that distinguish tourism events from community events. Once we have […] the calendar of events that we'll be supporting, we plug it into everything we do. So we see it as a key platform for driving visitation (LTOR).

Strategic advice is thus based on how events can contribute to the tourism profile of the region. While funding applications are submitted in isolation from other events, the value of an event to the destination is considered with reference to existing events: "So we're not just attracting big events, we're trying to create an enhancement of the events that we've already got" (LGR). The Events Board recommends what events should be supported within the destination to maximise the value of the event portfolio. Indeed, through providing various types of funding, the Events Board can ensure the distribution of events across the destination and year:

> Unlike a lot of other regional tourism organisations, we sponsor events. From small events, to large events, our focus on event funding is about sustainability and about evening out seasonality […]. There's always something happening, but [we're] also conscious of the need to balance that with community and making sure that local residents don't become angry about the volume of events in town (LTOR).

Note that while the focus of creating an event portfolio is driven by the tourism strategy and counteracting tourism seasonality, consideration is also given to the welfare of the local community.

In summary, the Events Strategy and Events Board were formed with the clear purpose of providing strategic direction on the destination's event portfolio. Respondents saw the event portfolio as a key strategic tool to counteract tourism seasonality in the region and to stimulate tourism. The Events Board represented a collaborative approach of bringing together key destination stakeholders with event and tourism expertise. The primary mechanism that was used to create the event portfolio was the provision of funding.

5.4.2 *Management and governance*

Mechanisms such as contracts, collaboration among stakeholders, dedicated relationship maintenance staff, and engagement of the wider business community through a leveraging programme, fostered relationship development through the event portfolio.

*5.4.2.1 Contracts as relationship builders.*To manage the relationships between the destination and the events, funding agreements were contractual:

> [W]e do have a really productive and direct relationship with our events. Obviously, we have a really clear contract […] a clear range of mutual benefits that we meet regularly on (LTOR).

Clear contracts that outline mutual benefits and expectations of the funding agreement guide the relationship process. Long-term contracts develop and maintain the relationships:

> Personal relationships are so important […]. First, you've got to have a very good relationship [with the event organisers]. We've got mechanisms in place to protect our sponsorship arrangements. We don't sponsor events for one year. We sponsor them for 3-5 years, [which] gives security to our event managers […]. We're giving them a sign that you do the right thing, we're going to keep supporting you (RCR).

Long-term funding provides security to the event manager as much as it does the destination:

> [W]e don't just deliver an event and then lose it. For example, the [national event awards], we negotiated a three-year contract, so we have it for three years […]. We now have a few very powerful event promoters. So we need to make sure that our relationships with them in particular are really good because they don't just do one event, they have multiple events. So relationships are critical (DMOR).

Clearly, event promoters manage multiple events, emphasising the importance of event portfolio development to establishing good relationships with events and event promoters.

5.4.2.2 Collaboration among all stakeholders.

The way funding was provided created the potential for relationship development between the tourism stakeholders and events. Constant dialogue between the destination and events enhances collaboration:

> We do sit down with the events and really work through the details of the marketing plan. Come to a joint agreement on where the most benefits will come from, in terms of those marketing activities […] and we have regular meetings to see how […] coordination is going. So we have a very strong collaborative […] partnership approach (LTOR).

The focus was therefore on creating an ongoing dialogue to maximise destination outcomes:

[I]t's very frequent dialogue that we have with the event, because we're not like *"here is your money, see you next year"* […]. [Stakeholder engagement] takes up a lot of our time, because that's how we see the value that we bring in terms of having constant dialogues with the events to see how they're tracking and what growth opportunities there are for them to expand their tourism footprint (STOR).

Respondents revealed the expectation that events receiving funding were a priority:

Any [event] that we have sponsored and that we have contracted to do, first and foremost […] that's where we'll spend our energy because we've got our own investment in them. We would expect that [the DMO] actually leverages off those events that we've invested in (RCR).

Thus, funding not only provided opportunities for relationships between the destination and the events, but also among the various destination stakeholders. For example, collaboration between council and the DMO occurs through ongoing meetings and communications of stakeholders, and were seen as allowing open discussion about achieving objectives:

[I]t's as simple as just getting everyone in the same room with the event, to basically talk about what our objectives are and how can we all help the event to get to a path where […] we all achieve our objectives and everyone wins from that event being in that region (STOR).

Relationships are created in part to ensure that resources committed through event funding and support achieve desired outcomes. Through collaboration and establishment of an event portfolio, the destination can market the range of events:

Our holiday guide always includes our events calendar for the coming year. So we ensure that […] our visitors are aware of the timing and the information. Our events that we sponsor plug into brochures, our website, our social media, Facebook and Instagram, our newsletters (LTOR).

5.4.2.3 Dedicated staff to maintain relationships.

A dedicated staff member from the regional tourism organisation liaises with the events to provide a positive relationship:

We have a full-time events liaison person now […] to ensure that we not only work with our partners to deliver a really good event, but also to make sure that […] the events are sustainable (DMOR).

In addition, the Council has dedicated staff to maintain the relationship between the destination and events:

In our sponsored events, we have a direct relationship. I've got guys in my team that have […] account management responsibility and we meet with [the DMO] frequently, around our events and with our event managers […]. I also have another person […] under our [business leveraging programme] that deals directly with the event managers […]. It's very important to us. If we don't have relationships with event managers, we don't have events (RCR).

5.4.2.4 Engaging the community through local business leveraging.

To maximise the benefits of the event portfolio to the local community, the destination has implemented a programme to encourage local business leverage:

> It's really about the small business. If we break it down […] we are doing such a big programme and sourcing and resourcing these major events […] so that we can help with our economy and prop up our small business operators and they in turn [create] employment, jobs, jobs, jobs, it's really what it's all about (LGR).

To create benefits to the wider community, the destination introduced a business leveraging programme: "We've actually even implemented a programme, which is directed just at small businesses to work out how they can leverage these events. How can they make a dollar? (LGR). The leveraging programme encourages greater engagement from the wider business community beyond tourism:

> That leveraging of an event may not be a tourism organisation. It might be a flower shop. [Or] someone not directly connected to tourism. So we invest heavily through our [business leveraging programme] to actually assist the businesses and to educate them about the opportunities, about what events are coming to town, how they can leverage off that event (RCR).

The business leveraging programme therefore increases the potential for relationships to develop with non-tourism businesses within the destination to further optimise event portfolio benefits.

To keep relationships between key stakeholders on track, contractual agreements guiding grant funding outline the roles and expectations of both parties. To strengthen relationships between the destination and the event, contracts are often long-term. Collaborations among the destination, events and key destination stakeholders further integrate the events into destination marketing and work as monitoring mechanisms to ensure that objectives are met. Dedicated staff are also tasked with monitoring the progress of reaching destination objectives.

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5.4.3 *Performance evaluation*

The key objective behind developing an event portfolio and providing funding as a means to support events was to increase the economic and tourism benefits to the destination: "[Funding is provided to] help them [event organisers] in terms of finance, to market, to leverage, bring tourists to our area, to give us an economic impact" (RCR). Strategy evaluation was largely based on growth of the event portfolio and the associated tourism and economic impact:

> We started out in 2012 with about 14 major events on the calendar. In 2016 we've expanded to over 60 major and regional events hosted in our region. It's quite extraordinary (LGR).

This respondent went on to explain:

> We're still in a huge growth period at the moment. The last 12 months we're looking at breaking a lot of our [tourism and event] records, both domestically and internationally. The international [tourism] numbers have been one of the highest in the country as the percentage of growth goes (LGR).

The success of leveraging the region's event portfolio was also acknowledged by the state:

> We've been recognized by the State Government as leading the pack in leveraging events […] to the point we've been invited by the State Government to present at [a state sponsored tourism forum], around this very subject. (RCR)

Success was further acknowledged by the enthusiasm within the event and tourism community:

> I can tell you, hand on heart, that we're probably doing [event leveraging] the best in the country. The whole idea of bringing the events base to the region is about leveraging, about getting the economy pumping. Success breeds success. Because we're doing these major events really well, other major events want to come here […]. So we've got this real boiling pot of reasons why events should come to town […] and we're exploiting it as best we can (LGR).

Note above that events were seeking to come to the destination – a validation of success. The respondent saw success as a reflection of the leveraging taking place within the destination and the reputation thus established.

There was also constant reflection of the composition of the events within the portfolio. This happened on an event-by-event basis: "[W]hat happens is that the [destination] Events Board will

work out what the good ones are and what the dud ones are and make recommendations to Council" (LGR). This activity occurred through the events providing an acquittal as part of their funding agreements:

> The post-event acquittal stage, that's where [the events] formally have the post-event report, whereby they report on how the event went. That sort of formalises the acquittal of the event (STOR).

In addition to individual event evaluations, evaluation of the portfolio as a whole was also done. For example, it was noted that the portfolio largely consisted of events that had the potential to increase tourists' length of stay of, as many events were staged over multiple days:

> Most of the events are multi-days. They're not just single days and that also, obviously is a strategy to increase the length of stay. So, [the food] event is a 4 day event. The [lifestyle event] is actually a 7, 8 day event in its entirety. The [surfing event] is an 8 day event. So I think each of those events has that capacity to encourage people to stay a bit longer (LTOR).

While respondents acknowledged that events in the portfolio are in line with the strategy of optimising tourism benefits, they noted the portfolio was very sport-centric: "We know [the destination] loves sport events and are really good at it, but seriously, we've got to get more balanced" (DMOR). The event strategy stated that a diverse portfolio of events was needed, requiring expansion into other genres of events:

> We're very, sport-centric […]. So what we're looking for in our strategy […] is to make it more appropriate to the brand so there's an even mix of sport, arts and culture, food and produce, not just sport because that's what was happening (DMOR).

The strong sport focus was attributed to an established network of sport events in the destination. Strategies to expand the mix of events also sought to include other regions within the destination more suitable for other types of events:

> We are very much a coastal-dominant, sporting, event culture. We're trying to expand it so that we get more cultural events. Cultural and musical events are starting to take off and we're using the Hinterland every opportunity we can (LGR).

Respondents saw that creating a more balanced profile in terms of event genres was necessary, but so too was spreading events across the destination rather than a geographical concentration.

The region regularly analyses events on an individual basis and evaluates overall event portfolio composition. Additionally, the success of the event portfolio is measured against its ability to increase regional tourism and economic development. Modifications are made on the outcome of the assessments.

5.4.4 *Evolution*

The process of how the event portfolio is leveraged for tourism benefits is continuously evolving. Changes are made, in part due to learnings within the destination: "It's not all rainbows and lollipops. There are a lot of instances where we learn […] there's certainly been learning" (LGR).

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Changes have been based on identified deficits within the destination and are designed to facilitate and enhance collaborative relationships and better achieve outcomes:

> So [the destination] had an event structure. It had a tourism structure, a really good community structure, good infrastructure […]. Now the problem with this was all of these different bubbles [departments] were really good, but none of them connected […]. None of them leveraged off each other. [So we] created [a marketing campaign]. Simplistic, but that started it […] and we really started to move […]. They're all joined up now and aligned. And that's what made the big difference. You've just got to get them working together (DMOR).

Creating a joint marketing campaign brought together relevant tourism and event stakeholders and fostered collaboration among individuals who would have otherwise been working in isolation. Other attempts to create greater collaboration among stakeholders and maximise outcomes through partnerships led to the creation of a new position:

> We recently […] appointed a Partnerships Manager. The key objective is to broker corporate partnerships for [local tourism organisation], but also to benefit events. For example, if we develop a partnership with an airline we will include in that partnership linkages to our events (LTOR).

While the role was to broker tourism relationships, the benefits were purposefully extended to events, which produced greater synergies in the destination's event marketing. Changes were also made to the way in which event funding was spent:

> A change our Board introduced a couple of years ago was our funding structure. Some of the funding […] must go towards marketing activities, activities that we need to approve. Then we work very closely with the events in delivering those marketing strategies. So that element of our funding programme has really necessitated a much closer relationship with all of our events (LTOR).

To further facilitate relationships and maximise mutually beneficial outcomes, a formal process was instituted that brought relevant stakeholders together:

> We've formalised it, calling it the [programme name]. Twelve months before the event […] we start convening meetings with stakeholders in the region, whether it's local councils, the RTOs and the LTOs, key sponsors, and the event of course, to basically talk through what one another's objectives are and how can the event help us to meet them (STOR).

Deliberate attempts to maximise collaborations among destination stakeholders' activities were accompanied by linkages that developed among the events themselves:

> We're very much on building relationships and trying to grow the family. Grow the family of events. We often say it's the portfolio of events, but to be honest it really is a family [of] events because each of them know each other now, […] and they leverage amongst themselves too. They have events promoting other events (LGR).

While strong relationships existed among the events within the destination, the event genres within the portfolio lacked diversity, and strategies were introduced to increase diversity in event genres:

> Where we are lacking in the event space is in arts and culture. Again, we're very sports-orientated, and we have been for a very long time […]. [So] we've recently created another board, which is called the [destination] Arts Board, which is made up of all different art related operators. Commercial operators, artists themselves that will be helping out (LGR).

5.5 Discussion

Destination stakeholders acknowledged the importance of events as drivers of tourism, and outlined strategic goals through creation of a strategy document and an Events Board to oversee the management of an event portfolio. Formation of the Events Board brought together individuals with knowledge and experience regarding tourism and events. The board was composed of an array of tourism, government, and event stakeholders who were all guided by the strategic focus of maximising tourism generation from the destination's events. The board was akin to a cross-institutional task force or steering committee (Bell & Gallimore, 2015). The board, through enacting the event strategy and providing strategic recommendations on event funding allocations, was the control centre of the destination's event portfolio. This t differs from previous studies where the control of event portfolios was situated within existing organisations (Clark & Misener, 2015; Pereira et al., 2015), or was not formally organised (Ziakas & Costa, 2011b). The board created necessary alliances and coordination mechanisms that are key to successful leveraging (Chalip, 2017).

The event strategy focussed primarily on driving regional visitation. Decisions on which events to fund were based on smoothing out seasonality and ensuring a geographic and temporal spread (Getz, 2008). While developing relationships was not a stated strategic objective, the Events Board realised the importance of establishing relationships with each of the events to ensure regional benefits were maximised. The Events Board viewed long-term relationships with event managers as key to portfolio success. While relationships with each of the events was important, the Events Board viewed relationships with event promoters as particularly important, given their ability to bring more events into the region. This finding enforces the notion that relationships and networking are important when leveraging events (O'Brien & Gardiner, 2006). However, the findings of this research go further to outline how relationships can be used in the effective creation and management of an event portfolio.

Funding was used as a mechanism to manage mutually beneficial relationships between the destination and events. Funding contracts were viewed as both initiators of business relationships and anchors for long-term relationships. Contracts have been shown to be a relationship device that can leverage knowledge-based resources (Mouzas & Ford, 2012). Contracts are central to the management and governance of relationships as they provide an impetus for interaction (Hatteland, 2012). Funding contracts created a direct relationship between the destination and events and fostered close relationships through regular meetings. The contracts provided security to both the event and the destination by signalling a long-term relationship was to develop, thus ensuring the destination did not lose the event if it was successful. Funded events also received priority over unfunded events within the destination. However, the contract provided that the destination could terminate the funding agreement if the event did not deliver.

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Dedicated staff were also appointed to manage and govern the relationships with events. Specifically, dedicated staff from both the tourism organisation and the council were assigned as case managers to monitor event outcomes and enhance collaborations, thus encouraging cooperation, relationship development, and integration (Boddy, Macbeth, & Wagner, 2000). The destination viewed its ability to provide dedicated staff as a competitive advantage in attracting and keeping events. With the myriad of procedures and permits needed to deliver an event, event organisers welcomed the convenience of having dedicated staff for their event. The constant dialogue allowed idea generation and identification of mutual growth opportunities. Indeed, it is possible that the frequent interaction was a means of building trust, an important factor when developing relationships.

While all funded events were integrated into the region's event calendar, regular dialogue provided opportunities to profile the events in visiting media and other national advertising initiatives. These on-going interactions between destination and events allowed opportunities for cross-leveraging and co-branding (Chalip & Leyns, 2002). With the wider strategic focus on promoting economic development in the community, the destination ran workshops to educate and encourage local businesses to leverage off the events. The programme to engage local businesses in leveraging also served to generate relationships across the wider community (Chalip, 2004; Chalip & Leyns, 2002).

Performance was evaluated in a number of ways – growth in the number of events within the portfolio, growth in regional visitation, the contribution of each individual event, and the success of the event strategy. As the destination was positioning itself as an event destination, the number of events that expressed interest in coming to the region was also considered a measure of success. However, potential capacity issues were likely as the destination was already turning events away, necessitating balancing the number of events within the portfolio (Ziakas, 2010). As there exists no metric to calibrate the optimal number of events in a portfolio, destinations must make this determination on the basis of individual circumstance, and there was discussion of how the destination may have already reached its event capacity. The destination was acutely aware that resident perceptions and disruption had to be balanced with the tourism the events generated.

As a condition of funding, each event had to provide a post-event acquittal, which was a self-report analysis. The STOR also conducted evaluations. The evaluations allowed the Event Board to make decisions about which events to include and exclude from the event portfolio. The majority of events were multi-day events, an aspect that was instrumental in lengthening visitor stay and that highlights numerous mechanisms should be employed when evaluating event portfolios. Ultimately, the purpose of event portfolio evaluation is to assess the portfolio's contribution in delivering specific outcomes, and any evaluation of an event portfolio should be based on the specific destination objectives set at the outset of the strategy (Ziakas, 2013a).

The establishment of the Events Strategy and the Events Board connected previously disparate stakeholders in the joint pursuit of increasing tourism benefits through creating and managing an event portfolio. In addition to cross-institutional collaborations, positions were created to manage relationships between the destination and events. These relationships were also used to broker relationships among industry sponsors, tourism, and events stakeholders. Evolution also occurred as a result of the evaluation, which noted that the destination had a high proportion of sport events concentrated primarily in one coastal region of the destination. As the overreliance on one genre of events was seen as a limitation (Clark & Misener, 2015), plans were made to establish an arts and culture board to attract events of other genres. While a balanced portfolio may be useful (Ziakas, 2014), a question arises as to whether a destination can specialise in a niche area, such as sport. Pereira et al. (2015) provide an example of a destination choosing to focus on one particular type of event.

The use of funding as a control mechanism also evolved, with the tourism organisation adding stipulations of how funding could be spent. This constraint ensured that funding was used for stated tourism objectives, but also furthered the close interactions between tourism and event managers. Specifically, a monitoring process that included regular meetings among stakeholders allowed for greater synergies and cross-leveraging to occur and the objectives of all stakeholders to be voiced. Constant monitoring of a strategy is critical to enable decisions regarding revision and adaptation (Otley, 1999). Thus, creating opportunities for networking and relationship development is pivotal to successful event leveraging (Chalip & Leyns, 2002; O'Brien & Gardiner, 2006), and managing event portfolios (Ziakas, 2010). This paper has outlined strategies and mechanisms in order to ensure that relationships are effectively used in the creation and maintenance of event portfolios.

5.6   Conclusions and future research

While limited studies have examined the factors that facilitate networking in the event or event portfolio context (Chalip & Leyns, 2002; O'Brien & Gardiner, 2006), this research provides evidence that relationships are essential when creating and managing an event portfolio. The study used Parvatiyar and Sheth's (2000) four-stage relationship marketing model to explain the formation, management and governance, evaluation, and evolution of an event portfolio. While previous studies have examined cities that do not have an overarching strategy to guide and manage event portfolios (Clark & Misener, 2015; Pereira et al., 2015; Ziakas, 2010; Ziakas & Costa, 2011b) this study highlighted the importance of having a strategy and a board purposed with executing that strategy. The establishment of the Events Board provided a conduit to create and facilitate relationships among key event and tourism stakeholders within the region. Mutually beneficial opportunities could be identified, strategised, activated, and cross-leveraging opportunities developed. Study results

emphasise that cross-institutional linkages can be beneficial to generating economic development (Chalip, 2001; O'Brien & Gardiner, 2006).

Regarding event portfolios as opportunities for relationship development suggests that event portfolio evaluations should incorporate economic outcomes into a more relational focus. Managing the portfolio can be used to create and sustain relationships that eventually lead to long-term relationships and impacts (O'Brien & Gardiner, 2006). While assessment of each event constituted part of the evaluation, it was unclear how economic evaluations influenced decisions and whether they were balanced with relationship or networking objectives. Future research should further explore the decision process used to include events in the event portfolio.

Since the destination was established as an event-friendly destination, it was in the advantageous position of being able to turn events away. This effectively balanced tensions between generating tourism-related benefits and burdening local residents with the increased tourism from events. However, it is not certain whether turning events away may result in lost opportunities for tourism or local businesses. Future research could examine the perceptions of the community on the event portfolio's composition and impact on their lives. In addition, research could examine the perceptions of event organisers who are turned away from (or not supported by) a destination.

Future research should also assess the mechanisms that facilitate or impede relationship development in event portfolios. For example, an interesting question is whether the event portfolio is affected by staff turnover in roles that manage relationships between the destination and events. In addition, research could be conducted to specifically ascertain how events are cross-promoting or cross-leveraging each other. Further research could use organisational ecology (as used by Getz and Andersson, 2016), or perhaps social network analysis (as used by Ziakas and Costa, 2010) to study the evolution and relationships among key stakeholders over time.

This research is based on a single case-study design. Unlike most research on event portfolios, the destination used in this research had an established strategy and event board to implement the strategy. The destination also had formal processes in place to evaluate the event portfolio. Future research should examine the strategies and structures (or lack thereof) of other destinations in order to further assess how relationships can be used to maximise the leveraging capacity of the destination portfolio.

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CHAPTER 6 - CONCLUSION, LIMITATIONS AND FUTURE WORK

6.1 Conclusion

Event leverage focuses on the strategies that are designed to produce benefits from an event and not on the event itself (Chalip, 2014). Researchers who focus on event leveraging have therefore been critical of existing research on impact and legacy, which places the focus on the event rather than on how the event can be used to strategically benefit the destination (c.f., Chalip, 2018). Although the extant literature on event leverage has grown over the last decade, Chalip (2018) notes that, "leveraging research and theory are still embryonic" (p. 29). Research on event leverage has examined different strategies that have been used to leverage an event for various outcomes such as tourism (Chalip, 2000; Pereira et al., 2015), business outcomes (Chalip & Leyns, 2002; O'Brien, 2006; O'Brien & Gardiner, 2006), and sport participation (Chalip et al., 2017; Misener, 2015; Taks et al., 2013). Results have highlighted that cities and organisations that actively leverage an event receive more benefits than those that do not leverage (Kellett et al., 2008). The primary focus of research on event leverage has been on whether certain strategies result, or do not result, in anticipated benefits for one particular stakeholder. However, we know little about how or why strategies either produce or do not produce positive benefits for key stakeholders (Chien et al., 2017; Fairley & Kelly, 2017).

Chalip (2014) notes that for event leveraging, "the quality of effect depends entirely on strategic vision and implementation" (p. 406). However, much of the existing research has not focused on how leveraging strategies or leveraging objectives are developed and implemented (Chien et al., 2017; Fairley & Kelly, 2017), neither the system nor environment in which events are leveraged. Further, the perspective of key stakeholders who are partners in the leveraging strategy is often overlooked. Thus, the needs of other key stakeholders seem to be excluded. Therefore, the primary purpose of this PhD research was to understand the influence of leveraging strategies on key stakeholders such as local businesses, and small-scale event managers. Further, this research also sought to identify catalysts and impediments to successful leveraging by considering the influence of the systems in which the events are being leveraged. This research highlights the fact that leveraging strategies must be fluid and adapt to the barriers and opportunities that inevitably arise during the event hosting process.

While various leveraging approaches have been examined, it has been noted that extraneous factors, such as for example, the nature of event owners' formalised event requirements, may profoundly influence the success or otherwise of a particular leveraging approach. The perceived influence of these extraneous factors led to the formulation of Research Objective 1.

It is acknowledged that caution should be taken when applying a strategy for event leverage (Kennelly et al., 2017; Pereira et al., 2015; Perić, Đurkin, & Wise, 2016), as it is unclear what effect the strategy will have when applied in different contexts. For example, while a burgeoning number

of studies address event leverage in the mega-event context (Beesley & Chalip, 2011; Bell & Gallimore, 2015; Boukas et al., 2012; Karadakis et al., 2010; Taks, Green, Misener, & Chalip, 2014; Tichaawa & Bob, 2015; Tripodi & Hirons, 2009), the same cannot be said in the small-scale event context. It was this uncertainty regarding the leveraging context that prompted the formulation of Research Objective 2.

Tourism is a multifaceted system with several stakeholders (Freeman, 1984; Sautter & Leisen, 1999). Understandably, leveraging in the tourism context would be expected to take place within the operating environment for tourism (Goeldner & Ritchie, 2009). This environment where actors have the ability to influence other actors, is an interface between the organisation and the environment (Burns & Stalker, 1961; Håkansson & Snehota, 1989). The interaction and collaboration of the various stakeholders that are involved in tourism gives rise to relationships of varying descriptions and for differing purposes. Therefore, leveraging events and event portfolios require the development of relationships (Ziakas, 2010). While relationships are of central importance to business engagements, there is a lack of understanding about the utility of how relationships are formed and maintained in the management of event portfolios. This need to understand how relationships influenced the successful creation and maintenance of event portfolios motivated the design of Research Objective 3.

The three specific research objectives that guided this PhD thesis were:

Research objective 1: To examine how formalised regulations of event rights owners impact how a host community can leverage an event.

Research objective 2: To explore the applicability of tourism leveraging strategies devised for mega-events on small-scale events.

Research objective 3: To understand how relationships can facilitate the creation and maintenance of an event portfolio.

This chapter concludes the thesis by highlighting how the research findings have advanced the literature. The chapter first includes a summary of the research findings and contribution of each study. Following this, the theoretical and practical implications of each study are outlined, followed by limitations of the research, and directions for future research.

6.2   Summary of Research Findings and Implications

The first paper, incorporated as Chapter 3 in this thesis *"It was never ours:" Formalised event hosting rights and leverage*, drew on organisation theory, specifically, to examine the concept of formalisation and how the formalised regulations of global event rights owners, impact the leveraging efforts of host destinations. The study used the context of the 2007 ICC CWC that was staged in the West Indies and co-hosted by nine Caribbean islands. The event rights owner was the International Cricket Council (ICC). The study focused on two co-hosts, Barbados and Jamaica, as both countries announced their respective intent to strategically use the event to achieve development outcomes.

When an event rights owner, such as the ICC, awards an event to a destination or country, the hosting rights are awarded with the explicit understanding that the event must be hosted within certain parameters. These parameters or conditions are outlined in binding contracts called hosting agreements, and can be quite stringent (Amis & Slack, 2008; Thoma & Chalip, 2003). These formalised regulations standardise event owners' requirements to ensure consistent operation and delivery of the event (Dowse & Fletcher, 2018), the on-time delivery of tasks leading up to and during the event, while protecting the value of the event brand, and therefore, the event rights owners' equity in the asset (Valle, 2012).

While formalised regulations represent an important feature of an organisation's structure, as established in the organisation theory literature (Khandwalla, 1977; Mintzberg, 1979; Organ & Greene, 1981), they can also have a restricting effect. Previous studies using organisation theory demonstrate that overly formalised regulations have the potential to hinder experimentation, innovation, and ad hoc problem-solving (March & Simon, 1958), reduce the likelihood of individuals deviating from structured behaviour (Weick, 1979), and constrain creativity, autonomy, and exploration (Lenz & Lyles, 1983; White et al., 1980). Therefore, a formalised organisational structure potentially restricts decision-making power as behaviour and processes are prescribed and controlled, resulting in pre-programmed responses to issues (Hall, 1999b). Further, in some instances, the lack of autonomy imposed by formalised processes may alienate those who are tasked with implementation (Kanungo, 1979; Seeman, 1971).

While formalised organisational structures are commonplace in the operation of many international sport events, the influence of formalisation on how a host destination can leverage an event has not previously been examined. However, event researchers have noted that formalised regulations may hinder the efforts of stakeholders in the host destination (Cornelissen, 2007; Raco & Tunney, 2010; Rogerson, 2009; Van Wyk, 2008), with small businesses being disproportionately affected (Girginov, 2012; Pappalepore & Duignan, 2016; Raco & Tunney, 2010). However, exactly how the formalised nature of event rights impacts the host destination's ability to leverage is

unknown. The findings indicate that the formalised regulations of the event rights owner served to prescribe the activities of the LOC, which limited the host destinations' power to optimise benefits from the event. Specifically, the formalised regulations negatively impacted the extent to which the host communities were able to leverage the event, through preferring international suppliers over local suppliers, and curbing the display and celebration of local culture. This is particularly problematic and counter to the logic that host communities must benefit from the hosting of major and mega-sport events, particularly since these events typically consume a significant amount of public funds. In short, host destinations must be able to leverage events in order to realise sustainable benefits, else the recent trend of reluctance of cities to bid for these large-scale events will get ever more pervasive. As governments become more accountable to taxpayers and interest groups that actively lobby against hosting large events, interest in bidding for and hosting large-scale events will continue to wane (Rundio & Heere, 2016).

This study's findings suggest a need for greater collaboration between the event rights owners and host destinations in order to provide host communities every opportunity to benefit from event hosting. Further, the ability to showcase and celebrate the local culture through the event must be considered. Providing opportunities to engage local businesses through the display and celebration of local culture can help to stimulate local economies through the active engagement of community stakeholders/residents.

A grounded theory model developed from the findings showed how formalised regulations of event rights owners influence host destinations' ability to leverage events. The key findings reveal that the event represented an opportunity of a lifetime for the Caribbean region, but particularly the co- hosts, Barbados and Jamaica. The staging of the 2007 ICC Cricket World Cup (CWC) in the West Indies was a significant opportunity for the region and expectations for obtaining positive benefits were high. However, securing event benefits was not a forgone conclusion. It required a leveraging strategy for specifically targeted benefits and an organisation, separate from the event delivery machinery, to deliver said benefits. Furthermore, while expectations were high, there was a sense that many of the anticipated benefits went unrealised.

Not surprisingly, the ICC's highly formalised host agreements negatively impacted the host destinations' respective abilities to leverage the event. The contracts prescribed the use of preferential global partners to undertake certain event operations and services, while simultaneously proscribing the display and infusion of local culture into the event. The cumulative effects of these formalised regulations were: reduced opportunities for local suppliers (both to benefit financially and also to gain large event experience); limited display of local culture; and economic leakage from the local economy. Notwithstanding, host destinations with the capacity and confidence to push back, were

able to circumvent restrictions. As a result, additional benefits were realised by these host destinations.

The results showed that Jamaica, for the most part, acquiesced to the rules and regulations of the event rights owner and, as a result, secured only limited benefits. Meanwhile, Barbados had a clearly articulated strategic plan that was supported by a dedicated unit of government with the mandate to leverage benefits from the event. Despite the formalised regulations, Barbados' extensive planning provided the means to ensure that its strategic objectives were realised.

In instances where Barbadian representatives found the event rights owner's directives incompatible with leveraging objectives, tactics were devised to ensure that benefits were still generated. For example, the Barbadians believed the services offered by the preferred global hospitality supplier of the ICC were not superior to what could be done locally. Therefore, the Barbadians entered into discussions with the ICC's global supplier to negotiate for a local subcontractor to provide the hospitality services. This proved profitable for the Barbadians, netting millions of dollars into the local economy, but equally important, Barbadians were upskilled with knowledge around event supply chain management. There were other examples where Barbados was able to negotiate around the ICC's formalised regulations to obtain benefits. In the case of Jamaica, only one example demonstrated the Jamaicans pushing back against the stipulations of the ICC. For the most part, the Jamaicans observed the rules of the ICC, despite the sentiment that the rules were stringent and did not observe the local ethos and culture.

The acquiescent Jamaican response to the stipulations of the rights owner was precisely the response that formalisation is designed to invoke. However, the actions of the Barbadians run counter to the response expected in a formalised environment. There were no significant cultural or structural differences that would have precipitated the two island-states to act so vastly different to each other. Therefore, the Barbadians response was simply more strategic, and guided by the strategy and objectives set by Barbadian government and stewarded by the leveraging body. Thus, this research has advanced the literature by demonstrating that even in highly formalised arrangements, host destinations can devise and realise beneficial outcomes from event hosting. These benefits included experience in large-scale event hosting; knowledge-transfer of critical event operations skill; the creation of a cadre of event professionals and the start-up of new event-related businesses; and economic benefits to the local economy through the use of local suppliers.

Contrary to the majority of previous research which suggests small local businesses cannot handle the complexities of supplying large-scale events (Raco & Tunney, 2010; Rogerson, 2009; Van Wyk, 2008), the current study demonstrates that small local businesses can, in fact, realise benefits from hosting large-scale events (Chalip & Leyns, 2002). If provided with the appropriate strategic and policy support, as well as the requisite structures around business development mentorship and

training programmes, small businesses can handle the challenges of supplying large-scale events (O'Brien & Gardiner, 2006). Additionally, if event rights owners are to maintain the relevance and value of their respective event brands, it seems essential to incorporate greater flexibility into the event hosting regulations, by taking a consultative approach with the mindset of benefitting key stakeholders. In a study conducted by Pappalepore and Duignan (2016), the authors found that there was a gap between pre-event rhetoric and the outcomes that eventuated. While the small businesses that were examined in the Pappalepore and Duignan (2016) study did not seem to benefit from the event, this current study has shown that the interests of large-scale event rights owners need not disserve the benefits that can be gained by small local businesses. A conclusion of this thesis is that small local businesses can benefit from large-scale events – even with highly formalised regulations – if the commensurate support is provided. Further, this flexibility needs to become institutionalised into the practices and operations of the rights owner, if it is to successfully integrate an inclusive culture in the conduct of its business practices. Although the formalisation of regulations and procedures are necessary to manage events, especially large-scale events, these regulations need not be exclusionary. It is recommended that host destinations exercise greater assertiveness when negotiating the terms and conditions of hosting contracts, to ensure meaningful benefits can be leveraged for stakeholders within the host destination, and not skewed towards the interests of event rights holders.

In summary, this study has advanced the literature by providing empirical evidence which demonstrates that small local businesses can create benefit from large-scale events, by being included in the event supply chain. Including small local businesses does not mean that event rights owners need to do away with the formalised regulations that are essential in managing the operations of the event and safeguarding the event brand. What this current research has shown is that both stakeholder groups – rights owners and small local businesses – can benefit from events if an inclusive approach is taken. This means that measures should be included to ensure that small local businesses are adequately equipped and supported to take advantage of the opportunities presented by the event.

While Paper 1 explains how the rights owners of large-scale and mega-events have a significant amount of power over the way host destinations can leverage an event, Paper 2 explores where the balance of power lies in the context of smaller events, and demonstrates that power often lies with the destination. Incorporated in the thesis as Chapter 4, the second paper, *What about the event? How do tourism leveraging strategies affect small-scale events?*, utilised a qualitative case study approach to investigate the applicability of tourism leveraging strategies designed for mega-events on small-scale events. Specifically, this paper focused on the views of small-scale event managers and how they were influenced by a tourism leveraging strategy that was designed/crafted at a more regional/provincial level.

While much of our knowledge on event leverage is predicated on large-scale events (Beesley & Chalip, 2011; Bell & Gallimore, 2015; Gardiner & Chalip, 2006; Grix, 2012; Smith, 2010, 2014; Tichaawa & Bob, 2015), it has been suggested that the hosting of more smaller-scale events (as opposed to one mega-event) may be a more sustainable practice (Higham, 1999). Equally, many regional centres simply do not have the capacity to host large-scale or mega events. Research has shown that small-scale events are more sustainable as they utilise existing facilities and are less of a strain on the public purse (Gibson et al., 2012; Higham, 1999). However, there is limited research that examines the leveraging of small-scale events.

A universal definition of small-scale event is not available. However, several authors have used varying metrics or descriptors in an attempt to categorise small-scale events (Gibson et al., 2012; Gibson, Willming, & Holdnak, 2003; Gratton, Dobson, & Shibli, 2000; Veltri, Miller, & Harris, 2009). Small-scale events have teams that are made up of a small core of paid event practitioners. In many events and particularly in the case of small-scale events, the labour of the small core of paid event operation and staging team is greatly augmented by a pool of volunteers. In a study by Kerwin, Warner, Walker, and Stevens (2015) they described the event under investigation as small-scale based on three criteria. One of the criteria was the small number of paid event staff, which was ten persons as compared to the event volunteers that numbered 253. The meagre event budgets of small-scale events make them reliant on sponsorship, advertising, grants, and other forms of income to sustain the operations. Small-scale events are usually held in small to medium sized locales (so more local or regional communities) and are said to provide proportionately greater economic benefit than if they were held in a larger city (Veltri et al., 2009). Gibson et al., 2012 in agreeing with Wilson (2006), they note that small-scale events generate little media interest nationally and perhaps even less globally, often held annually, with relatively small spectator and/or competitor numbers. The resultant economic activity is less than that generated by large-scale event counterparts.

Therefore, the significant differences between small-scale events and large-scale events include the following. First, the number of paid event practitioners engaged in event administration, operations and staging. Second, event funding is also a major difference between small-scale events and large-scale events. Additionally, economic benefits, interest and appeal, participation and attendance are significantly less than that of large-scale events (Gibson et al., 2012). Notwithstanding, small-scale events play a significant role in generating economic activity for the local community and costs are kept low as local facilities are utilised (Higham, 1999). Small-scale events can deliver social benefits of improving the quality of life (Walo et al., 1996) and increased community spirit and pride (Horne, 2000; Veltri et al., 2009; Ziakas, 2010). Finally, small-scale events provide a useful opportunity for training in event hosting, thus developing the competence to host major events in the

future (cf. Pereira et al., 2015) and may have a lower carbon foot print (Collins, Jones, & Munday, 2009; Gibson et al., 2012).

Although event leverage knowledge is based primarily on large-scale events, tourism organisations and host destinations, utilise tourism leveraging strategies for events of all scales. Chalip (2017) notes that a "one-size-fits-all" approach may be counter-productive, as leveraging strategies should be designed as context- and destination-specific interventions. Chalip's (2017) proposition aligns with the principles of contingency theory (Burns & Stalker, 1961). Contingency theory posits that the design, adoption, and implementation of a strategy, should be specific to the circumstances of the organisation (Luthans, 1973; Otley, 1992; Van de Ven & Drazin, 1984), including organisational size (Neilsen, 1974).

Therefore, using contingency theory, the second study examined the influence of a tourism leveraging strategy on managers of small-scale events in a regional destination in Australia. The leveraging strategy, which was provided by the state tourism organisation, took the form of a grant-funding programme that encouraged event managers' participation. By participating in the leverage strategy, event managers had to comply with the grant funding guidelines. The main findings from the study revealed that while small-scale event managers were primarily involved for the purpose of celebrating an activity and its subculture they were passionate about, their compliance with the stipulations of the grant led to changes with the actual event, which diverted the event manager away from their event's core mission. Specifically, the leveraging strategy resulted in the event managers: adopting a tourism agenda; diverting event resources to tourism initiatives; expanding the event programme to encourage tourism; and, personally receiving little benefits from the tourism leveraging.

The grant funding guidelines influenced the event managers to adopt a tourism agenda; this "mission drift" ran counter to the event's core purpose. This form of influence is termed as "latent coercion", and highlights the extent to which event programming expanded to meet the tourism objective. The adoption of a tourism agenda, and the corresponding expansion of the event programme, diverted the already limited event resources from staging elements to satisfying tourism metrics. The event managers expressed the concern that, while they were largely responsible for implementing the leverage strategy and having to follow the onerous guidelines, they realised very little return for their efforts. The small-scale event managers felt it distracted them from the core purpose of their event and pointed to other tourism suppliers, for example, accommodation businesses and restaurants, who they considered to be the prime beneficiaries of the tourism gain. The event managers noted that the results they generated and later reported on in the acquittal process were not commensurate with the effort required to create the outcomes. In fact, the attention and resources of the event managers were diverted from the events' core mission in order to satisfy external objectives.

This mission drift highlights a consequence of collaborative engagements, where there is perceived inequity in the distribution of power between/among collaborative partners (Gray & Hay, 1986), or the partners share divergent goals and values (Waddock, 1989). Further, the responsibility for leveraging was passed on from the tourism organisations to the small-scale event managers and this impacted the attention that the small event team could give to the operational activities to stage the event.

Also, there was a view that the objectives needed to be better aligned to the event genre and target market, as a "one-size-fits-all" approach to event outcomes was not realistic. Likewise, directives regarding the narrow band of activities that funding could be spent on were also restrictive and did not acknowledge the event genre and its unique needs. Small-scale events are a sustainable and integral event class to the overall complement of events. Therefore, support for small-scale events is necessary if they are to be successful and contribute meaningfully to regional communities. Additionally, other non-monetary forms of event leveraging could be considered, such as business master classes or incubation services. Nevertheless, the event managers welcomed the opportunity to collaborate with the funding partners and viewed it as a positive step in strengthening the relationships. The small-scale event managers believed that collaborative initiatives should continue into the future.

The findings highlight that the outcomes derived from leveraging strategies will differ based on the size of the event. The results showed that leveraging small-scale events required a different approach from that used at mega-events and thus, a "one-size-fits-all" approach is simply not feasible. Indeed, as posited by the principles of contingency theory, managerial solutions are not automatically scalable (Neilsen, 1974). Additionally, this research highlighted that tourism leveraging may have negative implications when the strategies are not collaborative efforts involving all stakeholders. Future research should consider potential negative outcomes of leveraging events for tourism gain. Finally, although the premise that an event can be used as a leverageable resource to generate tourism outcomes is still applicable for small-scale events (Beesley & Chalip, 2011; Chalip, 2002, 2004), ill-conceived efforts to leverage small-scale events may negatively impact (the direction and scope of the event itself.

The first study highlighted the influence that the event rights owner had, through the process of formalisation, on the ability of the destination to leverage. The second study highlighted the influence of a tourism leveraging strategy on small-scale events. Both studies highlighted the necessity of collaborative efforts among stakeholders to ensure the generation of mutual benefits. Building on these studies, the third paper, examined the role of relationships in creating and maintaining an event portfolio; that study is presented in Chapter 5, *The utility of relationships in the creation and maintenance of an event portfolio*. Although the literature suggests that event portfolios

are known to promote synergies among events and stakeholders (Ziakas, 2014), there is very little research that examines the leveraging of event portfolios. Furthermore, while there is evidence showing the importance of relationships when leveraging an event (Chalip & Leyns, 2002; O'Brien & Gardiner, 2006), precisely how this can be achieved is unclear, particularly within the context of an event portfolio.

The study utilised an *a priori* relationship marketing process put forward by Parvatiyar and Sheth (2000) to examine the formation, management and governance, performance evaluation, and evolution of the event portfolio. It was found that the mechanisms and processes used to promote synergies between and among events and stakeholders were key to the development of a successful event portfolio. These included:

Formation of an event strategy, events board and key business relationships set the stage for developing and leveraging a portfolio of events.

Management and governance of the strategy utilised mechanisms such as long-term contracts, dedicated staff, collaborative engagement, local business leveraging and education which ensured that relationships were fruitful and provided a forum for discussion.

Performance evaluation was important to measure attained outcomes against projected outcomes. Evaluating performance is akin to strategy evaluation. The destination actively measured and evaluated the performance of its event portfolio to determine if the goals were met. The destination's performance appraisal systems indicated the success of the strategy.

Evolution is a valuable process for any dynamic organisation and is an extension of performance evaluation. After the performance was evaluated, adjustments were made where necessary. Although the performance evaluation confirmed the destination's strategy as a success, the destination did not become complacent. Rather, it did an introspection to critically evaluate performance and devised means of improvement. This led to the adoption of new practices and the creation of new committees to better support the strategy of the destination.

Using an event portfolio as a strategy to maximise tourism benefits is not new (Pereira et al., 2015; Ziakas, 2010, 2013a, 2013b, 2014b; Ziakas & Costa, 2011a). However, what this study highlighted was that having a coherent strategy and mechanisms to manage the event portfolio were important. Existing research on event portfolios in the academic literature primarily focuses on portfolios that have been unsuccessful (Pereira et al., 2015), or that lacked or had an ad hoc strategy (Clark & Misener, 2015; Ziakas, 2010). While this current research confirmed that relationships are useful, the findings went further to show, not only how these relationships were created, but also the mechanisms that guided the development and maintenance of the relationships. The combination of structural and operational components, in conjunction with the creation and maintenance of appropriate relationships, provided the framework for the effective use of an event portfolio strategy

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to deliver benefits to the host destination. Structural components that supported the event portfolio strategy included the establishment of an events board that brought together disparate, but key stakeholders. The events board was mandated to give guidance on funding allocation to events and the selection of events that were deemed a suitable fit for the destination. The development of an event strategy was the foundation of the destination's plan of action and the catalyst for the creation of the events board.

The operationalisation of the event strategy was based heavily on the cultivation of relationships. This saw the establishment and use of long-term contracts as a means of building relationships (Hatteland, 2012; Mouzas & Ford, 2012); fostering collaborative engagements among event, tourism, business and government stakeholders; providing a cadre of staff that was dedicated to maintain relationships with event managers (Boddy et al., 2000); engaging and involving the community through local business leveraging opportunities. The evaluation of the performance of individual events as well as the portfolio of events, was instrumental in assessing the attainment of objectives and useful in the process to adapt and modify the event strategy. Therefore, while this study concurs with previous studies in underscoring the value of relationships in tourism interactions (O'Brien & Gardiner, 2006; Ziakas, 2010), importantly, it has extended extant knowledge by showing how relationships and specific measures help to create and maintain event portfolios.

In summary, the three publications that comprise this PhD thesis have advanced our current understanding of event leverage. The key findings suggest that while event rights owners use formalised hosting contracts to ensure standardisation of their respective events across various geographical locations and time periods, the nature of this formalisation can either help or hinder relationships between event rights owners and local stakeholders. Ultimately, the quality of the relationship and the capability of the host community to plan for and work towards clear event objectives, determine the ability of host destinations to leverage benefits from the events. Although there are examples where event rights owners have incorporated required actions to be taken by host destinations, such as legacy plans and human rights principles, these charters do not go far enough. Event rights owners should consider how their practices affect a host destination's ability to benefit from the event. This is particularly important for developing nations that host large-scale events. It has been suggested that developing countries are more vulnerable to being exploited by event rights owners as formalised regulations may be damaging (Dowse, 2014). It has even been suggested that hosting rights should be withheld from developing nations (Dowse & Fletcher, 2018). Clearly, the conditions of hosting agreements can contribute to a challenging environment for enabling a host destination to leverage an event. This challenging environment can result in, *inter alia*, the alienation of local stakeholders, the exclusion of local cultural mores and practices in the hosting of the event,

the disproportionate use of preferential global partners over local businesses, and conditions that restrict local businesses and the host community from benefitting from the event.

Although event leverage is usually presented as a tool to deliver positive outcomes, this thesis has shown that leveraging also has negative implications, particularly where interactions are not collaborative, or do not involve key stakeholders. Small-scale event managers indicated that the grant funding leveraging strategy, initiated by tourism organisations, imposed certain restrictions that caused diversion from core event business and, in fact, caused changes to the format of their event programme. Consistent with the tenets of contingency theory, the findings show that managerial solutions are not automatically scalable. Therefore, event leverage strategies devised for mega-events, should not be applied to small-scale events without extensive collaboration with local stakeholders to make the necessary adjustments to suit the specific event- and destination-related factors.

Finally, this research presented empirical evidence that relationships are critical to creating and maintaining an event portfolio strategy. Further, this research showed that the success of the destination under investigation, can be attributed to the importance placed on developing and implementing an event strategy and the establishment of an oversight body, tasked with executing the strategy. Specifically, the destination's use of long-term contracts, dedicated staff to forge collaborative engagements and maintain relationships with event managers, and engaging with the local community through business leveraging and education, were mechanisms used in the management and governance process in fostering the development of relationships throughout the event portfolio. Further, the success of the destination could be attributed to its active performance appraisal systems and a reflexive culture, which is not averse to acknowledging weaknesses and taking remedial actions. While confirming the value of relationships, as established by previous studies (O'Brien & Gardiner, 2006; Ziakas, 2010), the present study has contributed to the literature by highlighting targeted measures and how these measures can enable and sustain relationships that help to create and maintain event portfolios. Understanding the factors that contribute to the successful creation and maintenance of event portfolios can serve to inform destination stakeholders entrusted with the responsibility for generating tourism related benefits from these portfolios.

6.3   Limitations of the PhD Thesis

This PhD thesis has made a strong contribution to advancing our knowledge of event leverage, in terms of highlighting how event leverage can affect, and is affected by, various stakeholders while illuminating the factors that enable successful outcomes, and suggesting that more event stakeholders can benefit if an inclusive approach is adopted. Notwithstanding these achievements, the inherent nature of the research process has imposed some limitations on the study.

First, this PhD thesis exclusively used a qualitative approach to conduct the investigations. While this method was entirely appropriate for the research objectives, the research objectives could be revised to incorporate some quantitative measure, thereby resulting in a mixed method approach. A mixed method could be useful in exploring other dimensions of the phenomenon, thus widening our understanding, and further testing the generalisability of the results. Further, an action research approach may be useful to assessing how future leveraging strategies are devised and implemented (Taks et al., 2018)

Second, the findings may not be generalisable outside of the contexts in which they were conducted. An in-depth understanding of event leverage will require further studies in multiple locations and within varying context. While a single destination area in Queensland, Australia and the Caribbean countries of Barbados and Jamaica provided a useful and diverse starting point, additional research across a wider area (countries, continents) will offer greater insight. Also the cultural context, social realities and geo-political issues specific to a locality, may mean that the findings are not generalisable, thus making it more imperative to conduct additional research in different settings to determine if similar or different outcomes are evident.

Further, in the case of the Australian study, a single event portfolio strategy was studied. While the portfolio consisted of varying event genres, perhaps the investigation of event portfolios that focused on a single event genre, could possibly yield richer information and greater understanding about the use and utility of event portfolios to leverage benefits for a host destination. It would also be instructive to determine if there are certain conditions that would not be advantageous to the use of an event portfolio strategy. Also, as performance evaluation is a critical step within the process model of relationship marketing, it is prudent to ensure that objectives are clearly devised and documented. The lack of actual or SMART key performance indicators in the evaluation phase is acknowledged as a limitation of the study. It is important for clear performance indicators to be outlined so as to make the evaluation process more efficient, transparent and credible. For example, the percentage of increase in the number of new events to be hosted in the destination vis-a-vis the genre of events, would serve as objective measures during the evaluation process. While the destination was able to provide broad objectives, this did not go far enough. Additionally, in the case of the Caribbean study context, only two of the nine Caribbean host countries were investigated, thus limiting the knowledge garnered. A research project that included all nine co-hosts would likely provide a broader investigation thus leading to a more comprehensive set of findings to inform our understanding of event leverage.

Third, seeking to investigate an event ten years after it was hosted has some challenges. For example, the accuracy with which participants were able to recall specific issues, and the unavailability of some potentially useful participants (death, relocation to other countries, unable to

connect/contact) may have limited access to data. Also, some documentation relating the 2007 ICC CWC could not be located due to poor archival systems or lack of access to the information. Although reasonable measures were taken to corroborate the veracity of the information, in light of the aforementioned issues, the use of document analysis as a data collection method, and to verify data collected via the face-to-face interviews, could not be utilised to its fullest capabilities.

6.4   Recommendations and Directions for Future Work

The following recommendations for the direction of future research on event leveraging are suggested. First, longitudinal studies should be used to examine leveraging strategies from their derivation through to implementation. The inclusion of experimental conditions to test the applicability and effectiveness of leveraging strategies in different contexts could be conducted. In order to document the process of event leverage, more research using case studies and action research could be conducted to formally and systematically capture the process.

Second, additional research on events of different types and scales should be conducted to understand the nuances that are associated with different event types and scales and understand what strategies are best for the effective leveraging of different events. Third, future research should assess the mechanisms that facilitate or impede relationship development in event portfolios. Perhaps more generally, to identify what conditions may be conducive or not conducive to an event leverage strategy. Further, this research highlights that there are many stakeholders involved in leveraging strategies. Future research could use stakeholder theory to explore the power and influence of stakeholders in various contexts.

Third, while the scope of the study did not seek to examine the business stakeholders, the findings suggest that Barbados is a unique study case as it relates to knowledge transfer as a leveraging opportunity. Not only was knowledge transfer a strategic objective on the part of Barbados, but concrete tactics were taken to nurture its success and evidence of this legacy persists well beyond the event. Indeed, these outcomes have persisted well beyond the 10-year mark given by Chalip (2017) and have thus earned the status of event *legacy*. The start-up of several local businesses which are still in operation, is a rare outcome and is a measure of the leveraging success. Specifically, the ability to transfer event hosting knowledge to build up a cadre of event professionals and event supply businesses. This is a key finding, that future research could be used to unearth even more evidence to strengthen such an important finding. Future research could seek to quantify the number of new businesses that were started as a direct result of the leveraging strategy and to determine the extent of their performance or growth over the years, among other objectives. Thus, broadening the category of stakeholders to include local businesses that were created as a result of hosting the event, would assist us in understanding the far-reaching impact of the leveraging strategy.

Finally, this research underpins the importance of investigating and understanding the impact of leveraging strategies on different stakeholders in the destination. Events, like tourism, operate in an interdependent system, and as such, multiple stakeholders are involved and these stakeholders need to rely on each other for the system to work optimally and to its potential. Therefore, it would be prudent for stakeholders to work collaboratively to develop benefits in such a way that all key stakeholders within the host destination feel included in the process and are able to reap tangible and meaningful benefits.

Appendices

Appendix A: Participant Information Form

Project Title: The impact of tourism leveraging strategies on regional events

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Objectives: Using contingency theory, the study seeks to understand from the event owner's perspective, how tourism leveraging strategies impact regional events. Also, the study will be useful to determine the event owners' opinion towards such event leverage strategies.

Involvement of participants: Participants will be interviewed individually using face-to-face, semi-structured interviews. Participants will be asked questions to elicit their perspective on the issue and to outline their relevant experience relating to the phenomenon. Interviews will be digitally recorded for subsequent transcription and data analysis. Interviews will take place at the participant's office at a mutually convenient time. Interviews are expected to be 60 to 90 minutes in duration.

Risks and Benefits: The risks involved to participants are negligible. Participants will be sharing their perspective and experience on the subject and it is not expected to negatively impact the participants. General findings of the study will be sent to participants upon completion of the research project. An UQ memorabilia will be provided to each participant as a token of appreciation for their time.

Participant confidentiality: The confidentiality and privacy of participants will be safeguarded in this study. Since the data collected will be potentially identifiable, identifying information will be kept confidential in order to maintain the privacy of respondents. Personal information such as name, organization affiliation, and position/title will be collected. However, pseudo names will be assigned to respondents (if necessary) and generic position names will be used instead of the respondent's full position/title. Organization names will also be omitted in the write up of the research. Participants' responses will only be available to the researcher and supervisors of this study. All data collected will be securely stored on a password-protected electronic file/system. The password is known only to the

researcher. On completion of the study all data will be safely and securely submitted to my principal supervisor and the UQBS.

Withdrawal from study: Involvement in this research is voluntary and participants reserve the right to withdraw from the study at any time by informing the researcher of their decision to withdraw. Once a participant withdraws, all interview data and personal information collected will be destroyed and not used in the research.

This study adheres to the Guidelines of the ethical review process of The University of Queensland and the National Statement on Ethical Conduct in Human Research. Whilst you are free to discuss your participation in this study with project staff (contactable on +61 0402 678 003), if you would like to speak to an officer of the University not involved in the study, you may contact the Ethics Coordinator on +61 7 3365 3924.

Appendix B: Participant Consent Form

Dear Participant:

RE: The impact of tourism leveraging strategies on regional events

As a participant in this research, your acceptance is required as confirmation of your informed consent to participating in this study. By completing the interview, you agree that you have read and understood the "Participant Information Sheet" for this research project.

You understand that participation is completely voluntary that you may withdraw at any time. You are also free not to answer any of the questions if you so choose. As outlined in the "Participant Information Sheet", participants are informed that this research is voluntary and that you reserve the right to withdraw from the study at any time by informing the researcher of your decision to withdraw. Once you indicate that you no longer want to participate in the study, all interview data and personal information collected will be destroyed and not used in the research.

Interviews will be digitally recorded. As a result, the data will be potentially identifiable. However, as outlined in the "Participant Information Form", measures have been instituted to preserve the privacy of participants. Potentially identifiable information will be kept confidential. Personal information will be collected. However, pseudo names will be assigned to respondents (if necessary) and generic position/title names will be used instead of the respondent's full position/ title. Organization names will also be omitted in the write up of the research. Participants' responses will only be available to the researcher and supervisors of this study. All data collected will be securely stored on a password-protected electronic file/system. The password is known only to the researcher. UQ researchers have at their disposal, a range of storage options. All data will be safely and securely submitted to my principal supervisor and the UQBS on completion of the study.

Thank you. I look forward to receiving your confirmation to participate in this study.

This study adheres to the Guidelines of the ethical review process of The University of Queensland and the National Statement on Ethical Conduct in Human Research. Whilst you are free to discuss your participation in this study with project staff (contactable on +61 0402 678 003), if you would like to speak to an officer of the University not involved in the study, you may contact the Ethics Coordinator on +61 7 3365 3924.

Principal Investigator: Donna M. Kelly

UQ Business School, The University of Queensland, St Lucia 4072.

Mobile phone: +61 0402 678 003; Email: d.kelly@business.uq.edu.au

Principal Advisor(s):

Dr. Sheranne Fairley; Office phone: +61 7 3346 0761; Email: s.fairley1@uq.edu.au

Confirmation to Participate

Please complete and return to Donna Kelly

Print Name: _____   Signature: _____   Date: _____

Appendix C: Interview Protocol

Project Title: The impact of tourism leveraging strategies on regional events

Project description: The study seeks to understand, from the event owner's perspective, how tourism leveraging strategies impact regional events. Much of what we know about leveraging events for tourism gain has been developed around mega-events such as the Olympic Games and the FIFA World Cup. However, destinations often adopt the same strategies and principles developed around mega-events for smaller regional events. This research uses contingency theory to advance our understanding of how regional events can be leveraged for tourism gain and to determine event owners' opinion towards such event leverage strategies. The participants are regional event owners in Queensland, Australia.

Event Leverage:

The strategic approach to planning outcomes from an event, by devising strategies to ensure maximum gain from an event. Event leverage therefore involves planning, strategizing, collaboration/partnerships/formation of networks, linking outcomes to destination objectives.

Examples:

Business Club Australia** related to the 2000 Sydney Olympic Games,

Pre-games training initiative related to the 2000 Sydney Olympic Games (Gardiner & Chalip, 2006)

The *Adopt-A-Second-Team* initiative related to the 2006 Commonwealth Games hosted by Victoria-the cities of Geelong and Port Phillip

"The phenomenon of strategically planning for the maximization of both short-term and long-term event outcomes" (O'Brien & Chalip, 2007, p. 267)

TASKS

Greeting

Give brief background on research. Read the **Project Description**

Discuss Informed Participant Consent and that interviews will be digitally recorded

Have participant read **"Participant Consent Form"** and **"Participant Information Form"** and sign both copies of the consent form

Return one to the participant and keep one for the researcher's files

Turn on recorder

Start the interview

Wording for Introduction: Good morning/afternoon (**name of person**). It is (**day/date, location and time**). (**Name of person**) is the (**position**) of (**name of event**). Thank you for agreeing to this interview, your input is vital to understanding the event owner's perspective on the impact of tourism leveraging strategies on regional events.

Conduct interview

Ask if participant has any questions for me

End interview

Thank participant and present gift

Turn off recorder

Send "Thank You" note via email within 24 hours

Appendix D: Semi-structured Questions (Paper 1)
TOURISM STAKEHOLDERS- CARIBBEAN STUDY

Project Title: A comparative study of Barbados and Jamaica, two host countries of the 2007 ICC Cricket World Cup

Research Question: How can host destinations leverage events?

Researcher's Name: Donna M. Kelly

Student's Number: 43376421

Degree course: PhD

Project description: Sporting events have become an almost ubiquitous element of the marketing mix for many destinations. Events, in particular sporting events, are increasingly being used as a strategic tool for destination marketing and national development. This study will examine the extent to which host countries leveraged the 2007 ICC CWC.

Given the focus of previous empirical studies, much of what we know about event legacy and leverage for tourism gain, have been largely developed around mega-events staged in developed nations. Although many destinations integrate events into their tourism strategies to deliver certain legacies and leverage a competitive advantage, very little is known about how these events are leveraged. By focusing on tourism stakeholders and former members of 2007 ICC CWC local organising committee members, it is expected to better understand how events owned by global event organisations can be leveraged.

INTERVIEW QUESTIONS

1. Do you remember the occasion when you first heard about the 2007 ICC CWC?
2. Can you recall how you felt about that event- personally and professionally?
3. What benefits were you expecting from that event?
4. What was the basis for your expectations?
5. Do you believe Barbados/Jamaica benefitted from the event?
6. Do you believe the Caribbean as a region benefitted from the event?
7. How important is tourism to Barbados/Jamaica?
8. What is the role of sporting events as it relates to increasing tourism business?

9. Do you believe the tourism industry in Barbados/Jamaica benefitted from the 2007 ICC CWC?

10. Was the country's tourism product and service mix leveraged/utilised to maximise the event's impact?

11. To what extent do you believe the planned outcomes were designed to drive tourism development?

12. What is your assessment of how the event was leveraged for tourism gain?

13. Is the destination aggressively leveraging sport events for tourism gain? If yes, how is this being done?

14. If no, how would you propose that this leveraging activity be accomplished?

15. What should the organisational structure for undertaking this leverage activity look like?

16. What are the legacies that exist from the 2007 ICC CWC?

17. How would you group/classify the legacies from the 2007 ICC CWC event?

18. To what extent do you believe that the initial plans included strategies to guide and monitor the ongoing legacy delivery?

19. Let us look forward; we are now approaching the 10th anniversary of the staging of the event.

20. Do you believe there is the potential to leverage the unexploited legacies of the 2007 ICC CWC in order to enhance tourism development?

21. How can these unexploited legacies be harnessed post-event to drive tourism development?

22. What are some of the potential barriers/challenges to realizing this?

23. What are some of the existing opportunities that could act as a catalyst for this development thrust?

24. Can you identify any missed opportunities in regards to harnessing event legacies?

25. If the region/country were to have a similar opportunity in the future, do you have any recommendations that would enhance the planning and delivery of the event?

Appendix E: Semi-structured Questions (Paper 2)
EVENT OWNERS

Project Title: The impact of tourism leveraging strategies on regional events

Researcher's Name: Donna M. Kelly

Student's Number: 43376421

Degree course: PhD

Project description: Much of what we know about leveraging events for tourism gain has been developed around mega-events such as the Olympic Games and the FIFA World Cup. However, destinations often adopt the same strategies and principles developed around mega-events for smaller regional events. This research uses contingency theory to advance our understanding of how small-scale events can be leveraged for tourism gain. The participants will include event owners, hospitality/tourism operators, and tourism policymakers.

1. How long have you been staging this event?
2. On average how many patrons do you get over the event days/per event season? How has this figure changed over the years? *(has it grown/declined steadily or best described as fluctuating?)*
3. What impacts have your event had on the region?
4. How important is your event to the tourism economy? → *what is its value to the region?*
5. Who would you say are the main beneficiaries of your event? *Why?*
6. How does your event tie in with tourism in the region?
7. Why do you care about tourism?
8. Who are the key (tourism) stakeholders that you would engage with?
9. Please describe each
10. Please explain how you work together
11. How do you plan the outcomes/benefits that you would like your event to achieve/attain? *(provide the steps)*

12. How do you develop the strategies to realize your event outcomes?

13. What are some of the strategies you have used in the past?

14. What are the strategies you are currently using?

15. How have these leveraging strategies impacted your event?

16. How would you describe your interaction with other event owners?

17. Describe your interaction with the tourism destination agencies as well as the other tourism stakeholders (e.g. State, federal, lobby groups, residents, other businesses).

18. Do event owners cooperate with each other to share resources and maximize benefits?

19. Do you collaborate with other events/tourism operators? How do you work with tourism/trade?

20. Are other stakeholders in the region trying to leverage off your event?

21. If yes, which other stakeholders and what specific activities have they been doing to leverage off your event?

22. If your event were to be removed from the region's calendar of events, what effect would its removal have on the tourism economy?

23. Do you believe you have any input into the decisions of Tourism & Events Queensland (TEQ-STO), Sunshine Coast Destination Limited (SCDL- RTO), Tourism Noosa (LTO), Noosa Shire Council, and Sunshine Coast Council (City Councils)?

24. If, yes, how do you contribute to the decisions made by the named entities?

25. What impact do decisions made by the named entities have on your event?

26. What are the strategies that have been put in place for **event value optimisation** (EVO)?
    - with other companies or events
    - with government/tourism agencies
    - how do you work together?

27. Do any tourism organizations use your event as a "resource" for attracting visitors?

28. If yes, how was this undertaken? Was it successful? Why?

29. Was there an impact on the event from this activity

30. How are key tourism organizations/stakeholders using your event for gains? Please name the specific objective(s) and the related tactic(s)

31. How is your event funded?

32. Are there any restrictions placed on funds received from donor organizations (grants/government funding)? *If yes, please state these restrictions?*

33. As a private entity do you believe public funds should be used to provide financial support to your event?

34. What are the key benefits that taxpayers receive from your event?

35. What kind of support would you like to have from any of the tourism organizations that you do not currently have?

36. How is post-event evaluation undertaken?

37. When is the post-event evaluation completed?

38. Who is responsible for undertaking the post-event evaluation?

39. What criteria do you use to evaluate your event outcomes?

Appendix F: Semi-structured Questions (Paper 3)
TOURISM POLICYMAKERS/MARKETERS

Project Title: The impact of tourism leveraging strategies on small-scale events

Researcher's Name: Donna M. Kelly

Student's Number: 43376421

Degree course: PhD

Project description: Much of what we know about leveraging events for tourism gain has been developed around mega-events such as the Olympic Games and the FIFA World Cup. However, destinations often adopt the same strategies and principles developed around mega-events for smaller regional events. This research uses contingency theory to advance our understanding of how small-scale events can be leveraged for tourism gain. The participants will include event owners, hospitality/tourism operators, and tourism policymakers.

1. How important is tourism to the state/region/destination Noosa?
2. What are the tourism objectives for state/region/destination Noosa?
3. What is the role of events as it relates to your tourism objectives?
4. How do you use events to meet your organization's goals?
5. In what ways do events contribute to the QLD/SC/Noosa economy?
6. Describe how your organization supports events that are staged in QLD/SC/Noosa?
7. Does your organisation actively leverage events for tourism gain?
8. *If yes*, describe how your organisation leverage events for tourism gain?
9. What are the objectives to be achieved by the use of an event leveraging strategy?
10. Explain whether or not the leverage strategy is having the intended outcome?
11. How can event leverage strategies that have been designed primarily around mega sport events be used to leverage small-scale events?
12. How is your organization seeking to maximize the tourism benefits from events staged in the destination?
13. What are the specific techniques used to leverage events?
14. What criteria does your organisation use to award grant funding to events?

15. Are there any restrictions placed on how the funds should be used?

16. What are the KPIs you expect the event to produce after receiving grants?

17. Do you conduct any post-event evaluation of the events that receive funding from your organisation?

18. How is post-event evaluation undertaken?

19. What criteria is used to evaluate the outcomes from the event?

20. When is the post-event evaluation completed?

21. Which officer is responsible for undertaking the post-event evaluation?

22. Apart from financial support, what other kinds of support does your organization provide to events?

23. What other kinds of support do you believe your organization can offer to event managers, that you are not currently providing?

24. How would you describe your organization's role in the formation of partnerships or collaborative initiatives with event managers?

25. How would you describe the interaction between your organisation and event managers?

26. In the past, your organisation has provided grant funding to events that are no longer staged. Did your organisation try to assist the event to ensure its survival? Given these "failures" will your organisation revisit/adjust its leveraging strategy?

Appendix G: Ethics Approval Letter

Date: 15/10/2015

To: **Donna Marie Kelly**
From: Dr. Tyler G. Okimoto, Chair UQBS Ethical Review Committee

RE: Your application for ethical clearance:
"Essays in Event Legacy and Leveraging" (#115422)

Dear Donna,

I am writing to inform you that the UQBS Ethical Review Committee has received your revised application. Given the changes and greater clarification provided, the committee has determined that your application is **approved conditional on a signed gatekeeper letter(s) of consent**.

Data may not be collected until a signed gatekeeper letter(s) has been received. Once the gatekeeper letter(s) has been obtained, you may proceed with data collection. Please forward a copy of the signed letter(s) to the Ethical Review Committee for our records (v.balson@business.uq.edu.au).

Approval is subject to the conditions listed on the additional notes document (attached) – please retain both of these documents for your records. Although not yet a formal requirement of the UQBS ethics process, we strongly encourage you to review your data management plan with your supervisor (see attached checklist). If changes to the approved study protocol are required for any reason, please submit a written letter of ethical clearance amendment to the committee detailing all required changes and any implied ethical considerations (submit to Vivienne Balson, v.balson@business.uq.edu.au).

Regards,

Dr. Tyler G. Okimoto
Chair, UQBS Ethical Review Committee

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