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MODELLING CULTURAL SPECIAL EVENTS MANAGEMENT IN AN EGYPTIAN CONTEXT

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ABSTRACT

Since 1992, the Egyptian Ministry of Tourism has established an annual special events agenda to achieve a cluster of social, economic and political aims. Over a ten-year period, the special events involved have not demonstrated clear success; a situation partly attributed to managerial problems and the lack of a good practice model of special events management applicable to the Egyptian context. Thus, this study focuses upon developing a model for managing cultural special events, which is potentially applicable in an Egyptian context.

The issues related to special event managements were examined via an extensive literature review, which culminated in the development of a theoretical model of special events management. The theoretical model was then used as a projective instrument to stimulate the presentation of a multiple case study of three Welsh cultural special events. Utilizing semi-structured interviews, the Welsh cases resulted in three reasonably similar managerial models, which were then unified in a Welsh best practice model through the use of the Delphi technique.

Three Egyptian cultural special events were analysed, via document analysis, which enabled the exploration of the managerial models currently applied to these cultural special events. The three Egyptian models were then compared against the Welsh best practice model resulting in the identification of eight dissimilarities. Following discussions with Egyptian practitioners, via semi-structured interviews, these dissimilarities were reduced to six managerial problems to which the failure of some of the Egyptian events can be attributed: the absence of SMART objectives; the absence of initial financial study; the unjustified decision-making regarding launching special events; the insufficient lead-time for the planning activities, notably promotion; the absence of market research; and the absence of outcome evaluation.

Consequently, a theoretical guide for managing these six problem areas was developed out of the literature. Semi-structured interviews with the Welsh practitioners were utilized again leading to the development of the theoretical guide into a Welsh best practice guide. Finally, both the Welsh best practice model and guide were discussed with the Egyptian practitioners, via semi-structured interviews associated with the Delphi technique, resulting in the development of a suggested model and guide potentially applicable in an Egyptian context.

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LIST OF ABBREVIATIONS

AOPP	Aida Opera Performances, Pyramids
AOPP-C	Aida Opera Performances Pyramids, Coordinator
AOPP-MM	Aida Opera Performances Pyramids, Marketing Manager
ASEP	American Sport Education Program
EMC	El Mezalat Company
EMT	Egyptian Ministry of Tourism
EOHA	Egyptian Opera House Association
HRM	Human Resource Management
IIFF	Ismailia International Folklore Festival
IIFF-EM	Ismailia International Folklore Festival, Executive Manager
IIFF-MM	Ismailia International Folklore Festival, Marketing Manager
LIME	Llangollen International Musical Eisteddfod
LIME-GC	Llangollen International Musical Eisteddfod, General Secretary
MF	Mayfair Festival
MF-MD	Mayfair Festival, Marketing Director
MF-SEM	Mayfair Festival, Special Events Manager
NBF	Nile Bounty Festival
NBF-C	Nile Bounty Festival, Coordinator
NBF-S	Nile Bounty Festival, Supervisor
PCM	Project Cycle Management
RATPC	Regional Association for Tourist Promotion, Cairo
UE	Urdd Eisteddfod
UE-AM	Urdd Eisteddfod, Activities Manager

Chapter one

Introduction

1.1	The historical development of special events	1.2
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1.1 The historical development of special events

Special events have existed since ancient times as evidenced through the plethora of documentation left by many of the major ancient civilizations, which record examples of early special events. Many of these events were associated with natural phenomena or religious beliefs. For instance, in 3000 B.C, Ancient Egypt was a stage for religious special events, such as the Heb-Sed Festival, an open-air festival, which was held at the 30th anniversary of the Pharaoh's coronation and thereafter every three years (Elsabahy 1993). Other events were celebrating natural phenomena including Sham El Naseem Festival, at the beginning of the harvest season (each April) and the Opet Festival (i.e. the Nile Bounty Festival), at the beginning of the flood season (15th of August) (Seleem 1997). Moreover, no one can disregard the role of Ancient Greece in establishing the first Olympic Games in 776 BC (Youell 1994). In addition, Ancient China celebrated several special events, such as the Lantern Festival or Yuanxiao Jie (a traditional festival, which marks the end of the celebrations of the Chinese New Year) (Huanxing and Zhongmin 2002); and the Gokh Chin Festival of Xiaolan (an ancient religious festival taking place every sixty years) (Sofield and Li 1998).

From another perspective, the main universal religions celebrate a range of special events as well. For example, the Jews have celebrated several annual religious events (e.g. Passover, Purim, Sukkot) for almost 3000 years (AICE 2004). Similarly, Christ's birthday represents one of the most famous global special events. In Islam, pilgrimage offers one of the largest annual special events when more than two million individuals gather for the Haj in a single venue (i.e. Mecca) (BBC 2004).

Much later in the Middle Ages, special events were celebrated to commemorate particular occasions and seasons. Many of these events are still celebrated today, despite having undergone significant modification; e.g. Valentine's Day, Irish Halloween Day, All Fool's Day, Mothering Sunday and Mayfair (Haggerty 2002).

In the history of modern special events, arguably a key milestone change occurred when Thomas Cook began his organized tours in 1841. Cook's tours gave new power to special events as they helped boost the number of the special events' attendees due to increasing the number of both national and international tourists. It could be argued, as well, that this led to a change in the profile of the special events attendees. Before Cook's tours, special events were largely organized to serve a single segment (i.e. the local citizens). After Cook's tours, special events organizers became aware of the possibility to serve different segments with different needs, motivations, attitudes and even different languages.

> *The Great Exhibition of 1851 was his opportunity in the capital...he took 165,000 people in the year to wonder at Paxton's Crystal Palace...four years later he did the same for Paris and its exhibition as he did for Crystal Palace, the stoic British bearing the crossing of the Channel gallantly.*
>
> (Inglis 2000, p.47)

However, despite the long history of special events, none of the above examples were referred to, at the time, by the term "special event". Goldblatt (1997, p.1) claims that the first use of the term "special event" was in 1955 when Robert Jani, a Disneyland's manager, aiming to encourage guests to stay after 5:00 P.M, suggested:

> *The creation of a nightly parade that he dubbed the "Main Street Electric Parade". Dozens of floats with thousands of miniature lights would nightly glide down Main Street delighting thousands of guests who remained to enjoy the spectacle...one of the members of the media turned to Robert Jani...and asked "what do you call that program?" Jani replied, "a special event". "A special event, what is that?" the reporter asked...Jani thoughtfully answered..."A special event is that which is different from a normal day of living".*

Thus, Jani offered the first, and maybe the simplest, definition for special events (Goldblatt 1997). However, *"through the 1980s and 1990s, certain seminal events set the pattern for the contemporary events industry, as we know it today"* (McDonnell *et al* 1999, p.8) with perhaps the 1984 Los Angeles Olympic Games being a foremost example (Catherwood and Van Kirk 1992).

1.2 Defining special events

"Although special events have become an important element of the leisure and tourism product in many regions, there is still no widely accepted definitional framework for the term special event" (Jago and Shaw 1998, p.21). From a linguistic viewpoint, the Longman Active Study Dictionary (Summers 1989, p.204) defines "an event" as *"a happening, usually an important one"* and it defines "special" as *"something that is not of the regular or ordinary kind"* (Summers 1989, p.587). From a professional viewpoint, several studies (e.g. Tourism Canada 1989; Getz 1991; Catherwood and Van Kirk 1992; McDonald *et al* 1999) claim that special events, by their nature, are difficult to define. Enhancing this claim, the comprehensive special events dictionary entitled *the Dictionary Of Event Management* (Goldblatt and Mckibben 1996 cited Jago and Shaw 1998) surprisingly, does not provide any definition for the term "special event". This apparently reflects the difficulty of establishing consensus on defining special events. Arguably, two reasons justify this difficulty. First, the endless variety of activities, which can be gathered under the title "special events", i.e. different occasions ranging from anniversaries and birthdays to Olympic Games can be named a special event (Catherwood and Van Kirk 1992). This may explain Getz's (1991) claim that a universal definition is probably not practical. Second, the loose use of the word "special"; while *"defining event is a straightforward matter; determining what makes one special is problematic"* (Getz 1991, p.43) and is down to individual perception - what is special for one person might be an ordinary routine for another. This last reason might be why Getz (1991, p.44) suggests two definitions, one from that of the organizers' viewpoint and the other from a customer's perspective:

> *A special event is a one-time or frequently occurring event outside normal program or activities of the sponsoring or organizing body.*
>
> *To the customer or guest, a special event is an opportunity for leisure, social or cultural experience outside the normal range of choices or beyond everyday experience.*

Arguably, Getz's two definitions (Getz 1991) beside Jani's simple definition (Goldblatt, 1997) still represent the essence of most of the succeeding definitions (e.g. Hall 1992; Watt 1998; McDonnell *et al* 1999; Allen 2000). However, a different perspective in defining special events can be achieved by identifying the special event's principal features, which could arguably be:

1. Limited duration: special events are transient activities. They last for a temporary period, which might be as short as few hours (e.g. Abu Simple Festival, Egypt) (Ministry of Tourism 1994) or as long as six months (e.g. World Expo 2005) (Herald Tribune 2003). Whatever the duration, it should remain impermanent; otherwise it would convert into an ordinary event.
2. Extraordinariness: back to Jani's original definition for special events (Goldblatt 1997), the difference between an event and a special event is that the latter should be of a different nature rather than any other routine activity in the daily life of those who are participating in it.
3. Organized, rationalized efforts: ordinary events may happen spontaneously, whereas a special event cannot happen accidentally or for no reason. Someone has to make it happen (Getz 1997); someone has to organize it to achieve predefined aims.
4. Focal activities: special events always have a single focal activity (e.g. a football match) or a group of activities (e.g. artistic performances, food and beverage, and auctions), which satisfies the customers' needs and, at the same time, fulfils the organizers' aims.
5. Ceremonial nature: Despite the fact that wars, for example, may have all the above-mentioned features, they are not special events. Special events always have a ceremonial nature. *"A special event recognizes a unique moment in time with ceremony and ritual to satisfy specific needs"* (Goldblatt 1990, p.2).

However, notwithstanding Getz's (1997, p.4) comment that *"it will never be possible to come up with a universal standardized definition"*, based on the above-mentioned features, a new definition for special events, and the one which will be adopted for this research, could be suggested:

> *A temporary, organized occurrence, out of the usual life routine of the participants, which intends to fulfil predefined aims through presenting specific activities in a ceremonial atmosphere.*

1.3 Functions of special events

"The number of special events offered in many regions has grown at a very substantial rate in recent years. This assertion can be supported by noting the increase in size of the annual special event calendars that are produced by many tourist authorities" (Jago and Shaw 1998, p.21). The growth of interest in special events is also evidenced through the plethora of specialist texts, journals, conferences and research studies that has emerged in recent years. Several authors (e.g. Getz 1991, 1997; Hall 1992; Jago and Shaw 1998; Allen *et al* 2002) ascribe this growth to the flexibility of special events as a tool for achieving a wide range of economic, political, cultural and social aims.

In economic terms, special events can be employed for promoting products, destinations or even entire countries; encouraging long-term investment; creating new permanent and temporary jobs; generating direct economic benefits for the host communities through increasing visits (Hall 1992); improving the visitors' expenditure level or minimising "*leakage of resident money from the economy*" (Long and Perdue 1990, p.10). On the social and cultural levels, special events can be used for encouraging local participation; increasing awareness of an occasion or a socio-cultural value; increasing civic pride; satisfying the needs of special interest groups; conserving local traditions; galvanizing particular segments of society; strengthening volunteerism, cooperation and intercultural interaction (Getz 1991; Hall 1992). Special events can also be used at "*both the macro- and micro-political level*" (Hall 1992, p.88). Macro-politically, special events can enhance the international image of a county or a regime

(Hall 1992). Micro-politically, special events can be *"policy tools"* (Getz 1997, p.34) for strengthening the elite positions within local power structures (Hall 1992), promoting political ideologies or reducing political tensions.

1.4 Types of special events

Ancient special events activities were fundamentally designed to mirror or mark a natural phenomenon (e.g. rain, flood, or harvest season) or religious beliefs (e.g. holy occurrences). However, over time, numerous other forms of special events have emerged such as the cultural, social, political and sports events. Each type can be sub-divided to recognize a number of sub-types (e.g. cultural events include sub-types such as ethnic and historical events). Arguably, it is hardly possible now to give a comprehensive list including all the types and sub-types of special events. Special events can also be categorized according to frequency (i.e. one-off and recurring events) or financial purpose (i.e. for- profit and not-for-profit events). On the other hand, "mega events" is a widely-used term, which usually reflects *"a one-off major event that is generally of an international scale"* (Jago and Shaw 1998, p.29). Other authors (e.g. Marries 1987; Hall 1992) concentrate on applying measurable indicators regarding the special event costs or number of attendees when defining mega events; nevertheless special events are rarely categorized according to their size. However:

> *The definitional problem is exacerbated by the common use of a number of related terms such an event, special event, hallmark event, major event, mega event, festival and fair, which tends to blur further whatever boundaries do exist between the different categories.*
>
> (Jago and Shaw 1998, p.23)

Therefore, in their extensive article on the special events' typologies, Jago and Shaw (1998) examine the differences existing between the definitions of each term. However, it is important for special events' organizers to recognize the dissimilarities between the special events' types concerning their features and organizational procedures; but it is also important to consider that *"there are more generic similarities than individual differences"* (Watt 1998, p.3).

1.5 Cultural special events

The term "culture" is one of those terms, which have acquired alternative meanings over time. Referring to these meanings, Waters (1994, p.14-17) states that:

> *In all its earliest uses culture was a noun of process: the tending of natural growth, as a farmer cultivates his land encouraging crops to grow. In the late eighteenth century, people began applying this metaphorically to human development, and the word took on a snobbish tone...In the nineteenth...culture was seen as the antithesis of the mechanical character of society that resulted from industrialization. Culture implied knowledge, aesthetic appreciation, creativity, intellectual activity and receptiveness to new idea...anthropologists use culture to describe the whole way of life of a people...which includes knowledge, beliefs, art, morals, customs and any other capabilities acquired by man as a member of society.*

Another widely recognizable definition for culture is *"an umbrella word that encompasses a whole set of implicit, widely shared beliefs, traditions, values, and expectations that characterize a particular group of people"* (Pizam 1993 cited Long and Sellars 1996, p.150). From the special events' viewpoint, cultural events could be described as one of the special event types, which can involve a diverse range of activities such as artistic performances, ethnic celebrations and historical ceremonies. In this context, arguably two dilemmas face researchers studying cultural events. First, the loose nature of the term "culture". Culture contains endless activities which can hardly be confined within limits; i.e. culture is *"the whole way of life of a people"* or *"culture is that complex whole which includes knowledge, belief, arts, morals, customs and any other capabilities and habits acquired by man as a member of society"* (Waters 1994, p.17). Therefore, traditions, religions, customs, food, beverage and even dancing might all be valid sub-titles for the term "culture". The second dilemma can arguably be entitled "the cultural dissonance"; i.e. what is considered a cultural event for a certain segment might be a religious or a social event for others. For example, a traditional wedding celebration in an African tribe might be seen as a cultural event through European visitors' eyes, whereas it is a social event for the local participants. Such controversy is unavoidable and immensely common in case of multi-national, multi-ethic, or multi-cultural participation.

Consequently, a cultural event can arguably be defined as:

> *An event, which mirrors in some or all of its activities some of the distinctive features of a particular community regarding its way of life.*

Whereas, a cultural special event can arguably be defined as:

> *A temporary, organized occurrence, out of the usual life routine of the participants, which intends to fulfil predefined aims through presenting specific activities that mirrors, in a ceremonial atmosphere, some of the distinctive features of a particular community regarding its way of life.*

As a result, any event, which exposes a part of any community characteristics, can be entitled "a cultural event". Thus, it can be argued that a significant percentage of the recent special events has cultural concepts regarding some of their activities. This may explain why some researchers (e.g. Hall and Zeppel 1990; Formica and Uysal 1998; McHone and Rungeling 1999) regard festivals, in general, as a cultural activity. While with more clarity, Frisby and Getz (1989) claim that festivals have frequently been labelled as cultural events because they usually bring back into life old traditions, local cultural and historical trends.

1.6 Special events in Egypt

Following the worldwide growth of special events, the Egyptian Ministry of Tourism (EMT) has established, since 1992, an annual special events agenda, which on average comprises twenty-five special events. The agenda is designed mainly to help improve the image of Egypt as a secure tourist destination, enrich the Egyptian tourist product, attract increasing numbers of international tourists and therefore achieve indirect financial profit for the community (Ministry of Tourism 1994). Over a ten-year period, these agendas have had varying degrees of success. Some special events (e.g. Pharaoh's Rally; Ismailia International Folklore Festival; Aida Opera Performances) have not managed to achieve their projected schedules; i.e. they have run some years and, for various reasons, have been cancelled other years. Expressing her experience as one of the attendees of Aida Opera Performances, Pyramids 2002, Baker (2002, p.3) records:

> *Even on my way to the Pyramids area to watch Aida, I could not stop thinking that something would happen to oblige cancelling it again; maybe more than a reason boosted these feelings; first, the continuous apologies of the directors and the superstar sopranos; second the cancellation of the last two years performances...the reason of the first year cancellation* [2000], *which was decided less than a month before the opening, is unknown till now as we have not been even informed why it was cancelled or who decided that. Then the following year* [2001], *it was cancelled due to the incidents of September 11; these cancellations made me unsure whether it would take place this time or not despite being on my way to the most suitable place for performing this opera; the Pyramids area.*

Other special events (e.g. the Nile Bounty Festival; Abu Simple Festival; Tourism and Shopping Festival) have managed to run according to schedule, but have failed to achieve their aims (Sa'ad 2000). Moreover, doubts have been expressed about the financial losses associated with almost all the special events (e.g. Aida Opera Performances) and whether the promotional benefits could justify such losses (Akhbar El Yom 2002); besides comments about the lack of coordination in case of joint organization (e.g. Ismailia International Folklore Festival); the monetary difficulties due to the fund shortage (e.g. Nile Bounty Festival; Abu Simple Festival) and finally the unsatisfying quality offered by the Egyptian special events, in general (Sa'ad 2000).

The Egyptian special events variable success has been partly attributed to managerial problems and the lack of a good practice model of special events management applicable to the Egyptian context (Sa'ad 2000). Only one research study has been published on Egyptian special events (i.e. Sa'ad 2000), which focuses on profiling the Egyptian events and investigating their contribution to Egypt. However, the managerial procedures used for organizing special events in Egypt have not been studied before.

1.7 The research aims and objectives

The aim of this study is to develop a potentially applicable model for managing cultural special events in an Egyptian context to facilitate improvements in the managerial procedures required for organizing cultural special events in Egypt. To fulfil this aim, five objectives are determined:

1. To critically review the literature on special events management aiming to develop a unified theoretical model for managing special events.
2. To investigate the practical models utilized for managing cultural special events in Wales aiming to develop a Welsh best practice model for cultural special events management.
3. To explore the practical models utilized for managing cultural special events in Egypt aiming to identify the relevant Egyptian managerial problems.
4. To develop a Welsh best practice guide for managing the Egyptian problematic areas.
5. To discuss both the Welsh best practice model and guide with the Egyptian practitioners in order to develop them into a potentially applicable model and guide for managing cultural special events in an Egyptian context.

1.8 Overview of thesis

This thesis comprises eight chapters. This first chapter is *the introduction;* and has presented the preliminary framework of the work and set the scene for the later chapters. The second chapter is entitled *the research approach;* and it focuses on three issues. First, it demonstrates the research approach, which was applied in this thesis. Second, it explores the researcher's philosophical stance underpinning the research. Finally, it investigates the researcher methodological stance, including a theoretical description of the chosen methodology and methods followed by a precise description of the fieldwork conducted during the research.

The third chapter is *the literature review*, which provides the theoretical framework of the study aiming to achieve enhanced understanding of the procedures of managing special events. The third chapter focuses on applying a project cycle management of four stages: decision; planning; implementation and outcome evaluation, as an organizing framework for the analysis of the extensive literature on special events management. These four phases are investigated in detail, where the decision phase comprises: defining the event catalyst, generating ideas, forming the management board, defining the event aims and objectives, forming the event initial features, conducting feasibility study and decision-making. The planning phase then includes: forming the event features, financial study, human resource management, marketing and logistics. The implementation phase embraces: dealing with contingencies, monitoring the implementation and shutdown activities. Finally, the evaluation phase consists of evaluating the fulfilment of the event aims and suggesting improvements for the following events. From the literature review, a unified theoretical model for managing special events is developed.

The fourth chapter is entitled *cultural special events in a Welsh context.* The chapter describes a multiple case study of three Welsh cultural special events (i.e. Llangollen International Musical Eisteddfod; the Mayfair Festival, at the Museum of Welsh Life and the Urdd Eisteddfod), where the theoretical model was used as a projective instrument to stimulate the discussion and facilitate the data collection in the semi-structured interviews with the Welsh practitioners. From the interviews, three relatively similar practical models were developed to reflect the managerial procedures, which are utilized for organizing the three Welsh cultural events. Afterwards, a Delphi technique was employed to facilitate building consensus on a Welsh best practice model for managing cultural special events.

The fifth chapter is entitled *investigating the Egyptian cultural special events management.* This chapter illustrates a multiple case study of three Egyptian cultural special events (i.e. Nile Bounty Festival, Ismailia International Folklore Festival and Aida Opera Performance, Pyramids). The three Egyptian events were investigated via document analysis aiming to explore the managerial practical models utilized for organizing the three Egyptian events. The document analysis resulted in the development of three Egyptian models, which were then compared against the Welsh best practice model. The comparison revealed eight dissimilarities. Following discussions with Egyptian practitioners, via semi-structured interviews, these eight dissimilarities were reduced to six managerial problems to which the failure of some of the Egyptian cultural special events can be attributed

Chapter six is entitled *adapting the Welsh best practice model to an Egyptian context.* In this chapter the Welsh best practice model was used as a projective instrument to stimulate the Egyptian practitioners to comment on the Welsh model and to propose what they think to be necessary modifications, with the aim of developing a potentially applicable model for managing cultural special events in an Egyptian context. The Welsh best practice model was discussed with the Egyptian practitioners via semi-structured interviews, which resulted in the development of three recommended models for managing cultural special events in Egypt. A Delphi technique was then employed to facilitate building consensus on a potential applicable model for managing cultural special events in Egypt.

Chapter seven is entitled *solving the Egyptian managerial problems*. This chapter discusses the six managerial problems identified in chapter five. In this regard, the chapter starts by reviewing the literature on the special events management in order to develop a theoretical guide for managing the Egyptian problem areas. The theoretical guide was then discussed with the Welsh practitioners, via semi-structured interviews, which resulted in concluding a Welsh best practice guide. Afterwards, the Welsh best practice guide was discussed with the Egyptian practitioners, which resulted in developing the Welsh guide into a potentially applicable Egyptian guide.

Finally, chapter eight concludes the study. It describes the research major findings, contributions to theory, practice and methodology, the research limitations, the opportunities for future research and finally the researcher's personal reflections on the research process.

Chapter two

Research approach

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2.1 Introduction

The research approach is essential as it forms the framework for establishing and interpreting the research (Lincoln and Guba 1985). As well, it justifies the research procedures and therefore the research findings (i.e. the more appropriate the research approach the more convincing the outcome) (Crotty 1998). This chapter focuses on three issues. First, it discusses the research approach, including: the paradigm, theoretical perspective, methodology and methods. Second, it explores the researcher's philosophical stance underpinning the research. Third, it examines the research's practical stance including a theoretical description of the research methodology, followed by a detailed description of the specific method adopted.

2.2 The research approach

A noteworthy part of the debate over social research concerns the researchers' selection of the research approach. Arguably, different factors coalesce to turn this key decision–making process into a confusing task for some researchers. In this respect, two reasons can, debatably, justify why such confusion occurs. First, a terminological problem - as the terms used in the social research literature are far from consistent (Crotty 1998) and consequently, researchers may find the same term used in a number of different ways[1]; different terms used to express the same topic[2]; and the inaccurate usage of some terms[3]. Second, in some literature paradigm, theoretical perspective, methodology and methods are not elucidated in a highly organised fashion in terms of

[1] For example, the usage of the term "epistemology", which according to Denzin and Lincoln (1998: p.26) means, *"What is the relationship between the inquirer and the known?"* While, for Crotty (1998: p.3) it means *"a way of understanding and explaining how we know what we know".* In the same context, Williams and May, (1996 cited Seale, 1998: p.10) claims *"epistemology is an answer to the question where does our knowledge come from? And how reliable is it?"*

[2] For example, the usage of the term "research traditions" as a synonym for the "theoretical perspective" (see Finn *et al*, 2000: p.5), "research approaches" for "methodologies" and "research techniques" for "methods" (see Blaxter *et al*, 1996: p.59); also using the term "model" for "epistemology" (see Silverman, 2000: p.77).

[3] For example, the use of the term "methodology" in an inclusive way for describing the whole process of designing the research system. Thus, researchers may assume that methodology is an umbrella which covers their epistemologies, theoretical perspectives and methods, whereas, methodology - as seen later - is just a single level on the philosophical hierarchy of the research designing process. Another example, Finn *et al* (2000: p.4) claims that *"there are essentially three main styles of research in the social sciences...they include the: survey method, experimental method and ethnographic method"*, arguably, they are not "methods"; he means -"methodologies".

their interrelationships inside the research approach hierarchy[4]. As a result, the research philosophical issues may appear more as a maze than a pathway to systematic research. Aiming to avoid such confusion, two actions can arguably be suggested: first, researchers should explain precisely what they mean by each term they adopt, otherwise different readers may understand it in different ways; second, four levels can be suggested for building the research approach hierarchy, which are: paradigm, theoretical perspective, methodology and methods (figure 2.1).

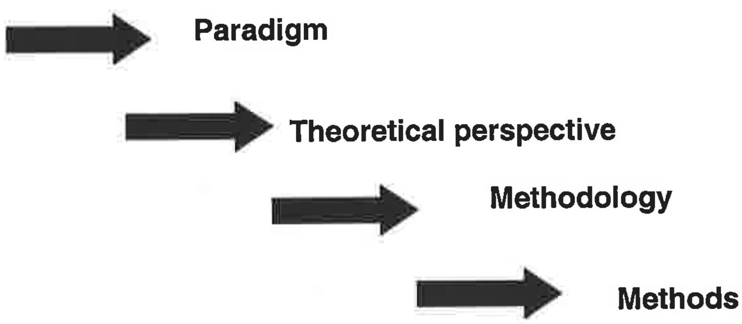

Figure 2.1 The research approach hierarchy (adapted from Crotty 1998)

This hierarchy could be split into two divisions, which could arguably be entitled: the researcher's philosophical stance including the paradigm and theoretical perspective, and the research practical stance including the methodology and methods. However, referring to the same approach in splitting the four elements into two clusters Crotty (1998, p.2) claims:

> *As a starting point, it can be suggested that, in developing a research proposal, we need to put considerable effort into answering two questions in particular. First, what methodologies and methods will we be employing in the research we propose to do? Second, how do we justify this choice and use of methodologies and methods?...Justification of our choice and particular use of methodology and methods is something that reaches into ...our theoretical perspective. It also reaches into the understanding you and I have of what human knowledge is.*

Arguably, the segregation point between the two stances is the degree of changeability toward different social research topics. In this regard, the practical stance

[4] It is common, for example, *"to find, say, symbolic interactionism, ethnography and constructionism simply set side by side as methodologies, approaches, perspectives or something similar. Yet they are not truly comparable...ethnography, after all, is a methodology. Symbolic interactionism is a theoretical perspective ...Constructionism is an epistemology* (Crotty 1988, 3).

can arguably be described as "of a more changeable nature" (i.e. an individual researcher is likely to change the methods and the methodology applied from one research to another depending mainly on the research topic and therefore the research questions and the nature of data required for answering them). Whereas, the researcher's philosophical stance can be described as "of a less changeable nature". Assuming that the paradigm is a cluster of highly abstract principles, which combine beliefs about epistemology (what is the relationship between the inquirer and the known?) and ontology (what is the nature of reality?) that shape how the researcher sees the world and acts in it (Denzin and Lincoln 1998). As well, assuming that theoretical perspective is *"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), then the researcher's philosophical stance (i.e. paradigm and theoretical perspective) would be likely to be less affected by the continuous shifting of a particular researcher from a piece of research to another. It will then be of a more permanent nature, except if the researcher has reasons to change her/his beliefs about the reality and nature of knowledge in the world. In other words, if a researcher is undertaking two or more pieces of research at the same time, can s/he adopt contradicted philosophical stances? If yes, then the sentence "about the world" should be disregarded from the definition of both the paradigm and the theoretical perspective, as it would then not be "beliefs about the world". A combination of both the more changeable research practical stance and the less changeable researcher's philosophical stance form the research approach (figure 2.2).

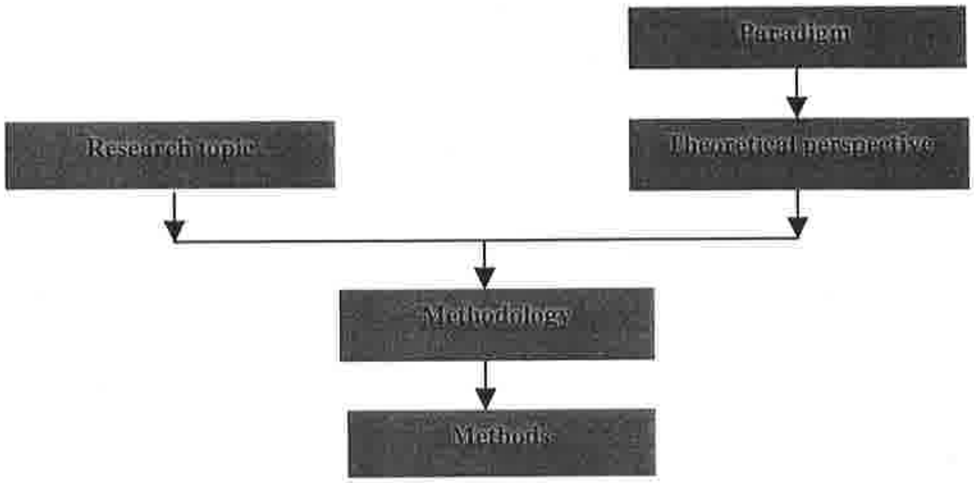

Figure 2.2 The research approach

However, for justifying the research, researchers should take a rationalised arrow from one level to another, where harmonization should exist between each level and the other. In drawing the arrow, it would seem that:

> *The sky is the limit. Certainly, if it suits, any of the theoretical perspective could make use of any of the methodologies, and any of the methodologies could make use of any of the methods. There are typical strings, to be sure...but typical does not mean mandatory.*
>
> (Crotty 1998, p.12)

2.3 The researcher's philosophical stance

As early mentioned the researcher's philosophical stance consists of the paradigm (i.e. epistemology and ontology) and the theoretical perspective.

2.3.1 the paradigm

On the ground of reality, *"all human beings are guided by highly abstract principles"* (Bateson 1970 cited Denzin and Lincoln 1998, p.26). These principles combine beliefs about epistemology and ontology (Denzin and Lincoln 1998). Regarding the fact that these principles concern beliefs about the world, it would arguably emerge in the researcher's notion before engaging in her/his research even if s/he is not aware of these thoughts. According to Guba (1990 cited Denzin and Lincoln 1998), this cluster of epistemology and ontology can be termed the "paradigm".

In the context of epistemology, constructionism emerges as one of three well acknowledged epistemologies: objectivism, subjectivism and constructionism (Crotty 1998). On one hand, the objectivists believe that *"meaningful reality exists as such apart from the operation of any consciousness"* (Crotty 1998, p.8). Objects hold their own reality and meaning as they were there even before the existence of humankind, which consequently is not necessary in order to give an object its meaning. Thus, human beings are neither creating nor constructing truth, meaning or valid knowledge, they are just discovering it. So, the kind of relationship, which the objective epistemology suggests is a relation of separation, where the inquirer's role is confined to discovering the independent truth.

On the other hand subjectivists claim that meaning or reality is not discovered by the human being. As well, it does not come out of an interaction between the human being and the objects in the world but truth or meaning is imposed on the object by the mind. Consequently, the valid knowledge or truth is created out of nothing but the human consciousness and the object as such makes no contribution to the generation of the meaning (Crotty 1998). So, the kind of relationship that the subjective epistemology suggests is a relation of separation, where inquirer monopolizes creating truth.

In between the two extremes, the researcher adopts a constructionism epistemology. Summarizing the focal features of constructionism, Crotty (1998, p.8) claims:

> *Constructionism* [assumes that] *there is no objective truth waiting for us to discover it. Truth, or meaning, comes into existence in and out of our engagement with the realities in our world. There is no meaning without a mind. Meaning is not discovered, but constructed.*

Or in other words:	Object + mind		= Truth or meaning
	Known + Inquirer		*= Truth or meaning*

Thus, it can be argued that the key trait of constructionism is that knowledge is constructed out of the interaction between the human beings and the objects in the world (Crotty 1998). Simply, "meaning-making" needs two axes, mind and object.

> *Consciousness is always consciousness of; and there is no object, which is not an object for. There is no immanence of the object to consciousness unless one correlatively assigns the object a rational meaning, without which the object would not be an object for.*
>
> (Lyotard 1991 cited Crotty 1998, p.44)

So, the sort of relationship, which the constructionist epistemology suggests, is a relation of interaction, where both the human beings and the objects share the contribution to the meaning, reality or the valid knowledge.

Consequently, a constructionist researcher cannot claim that s/he is creating valid knowledge about a certain researched issue (e.g. models of managing cultural special events) out of nothing but her/his mind, without interacting with the objects related to the researched issue in the real world (e.g. the real milieu of the cultural special events management). As well, s/he cannot claim that s/he is discovering valid knowledge, which exists in the real world apart from any humankind interaction (e.g. the researcher and special events organizers interpretation for the models of cultural special events management).

The constructionist epistemology is usually engaged with a relativism ontology, which claims, *"there is only truth and no universal truth, versions of reality but no one reality"* (Seale 1998, p.20). In other words, there are multi-faceted realities, which is of a flexible nature along with the individuals' viewpoints (Denzin and Lincoln 1998). Referring to the same issue, Crotty (1998, p.9) notes that *"it is clear that different people may construct meaning in different ways, even in relation to the same phenomenon".*

So, according to the relativist ontology, the truth (i.e. meaning, reality or valid knowledge) does not have a single nature, which is applicable everywhere, as assumed in realism. This feature can be understood in the context of the constructionist epistemology. Presuming that reality is constructed through the interaction between the individuals and objects. Subsequently, it would be expected that each community or even each individual might have its own viewpoint toward the same object. Consequently, from a relativist's viewpoint, copying the experience of the others (e.g. a Welsh best practice model for cultural special event management), assuming it will thrive elsewhere (e.g. in Egypt), is hardly accepted, unless it is put into the context of the receiver community (e.g. the Egyptian context).

2.3.2 The theoretical perspective (interpretivism)

The theoretical perspective can be 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). In this respect, interpretivism emerges amongst several other well-acknowledged theoretical perspectives. However, numerous social researchers (e.g. Godbey and Scott 1990; Henderson 1990; Howe 1991; Glancy 1993; Veal 1997; Clark et al 1998) claim that as a result of a long history of criticising, the supremacy of the disciplines of natural science (e.g. positivism) on the social science research has been challenged by the interpretivist perspective.

One of the most central tenets of interpretivism is that: *"the social world is seen as socially constructed on the basis of shared meanings"* (Clark *et al* 1998, p.15). Obviously this tenet is mainly based on the constructionist epistemological assumption. This may explain why Crotty (1998) claims that constructionism and interpretivism are intertwined. This tenet explains also why interpretivist researchers consider the viewpoint and interpretation of the researched individuals as the key for understanding the researched phenomena and explains also the emphasis, from the interpretivists' viewpoint, on theory "based-on-data" without previous hypotheses. This leads to the second tenet of the interpretivist perspective where interpretivist researchers try to get inside the minds of the individuals under research in order to see the world from their viewpoint (Veal 1997). The third feature of interpretivism is the focus on meaning rather than facts alone (Clark *et al* 1998). Finally, aiming to cope with these tenets, interpretive researchers are less likely to be narrow and restrictive. Therefore they usually use more flexible methods (usually qualitative) within an inductive methodological approach.

In contrast to the deductive methodological approach adopted mainly by natural science researchers, induction approach tends to derive theories or models from the data gained from the field without trying to test previously prepared hypotheses. In this respect, the induction process begins with defining the researched phenomenon (models for managing cultural special events) and generating ideas about it (through the literature) (Veal 1997; Clark *et al* 1998). Embarking from those ideas researchers investigate the researched phenomenon in the field (data collection on cultural special events management in both Wales and Egypt), proceeding to data analysis and consequently explaining the researched phenomena (theorising or modelling). Portraying this approach, Finn *et al* (2000) describe induction as a theory-building approach where research precedes theorising; whereas, Gilbert (2001, p.19) states *"it is the basic technique for moving from a set of observations to a theory and it is at the heart of sociological theory construction".*

2.4 The research practical stance

As previously mentioned, the paradigm and the theoretical perspective together provide *"the philosophical stance that lies behind our chosen methodology"* (Crotty 1998, p.7). As far as the researcher's philosophical stance is concerned, the relation between the research hierarchy and the research topic can hardly be observed; linking them is precisely the role of methodology. Referring to part of this role, Denzin and Lincoln (1998) indicate that methodologies connect the researcher's philosophical stance to specific methods of collecting and analysing data, as it describes the practical procedures, which the researchers apply as they move from their philosophical paradigms to the real world (figure 2.3).

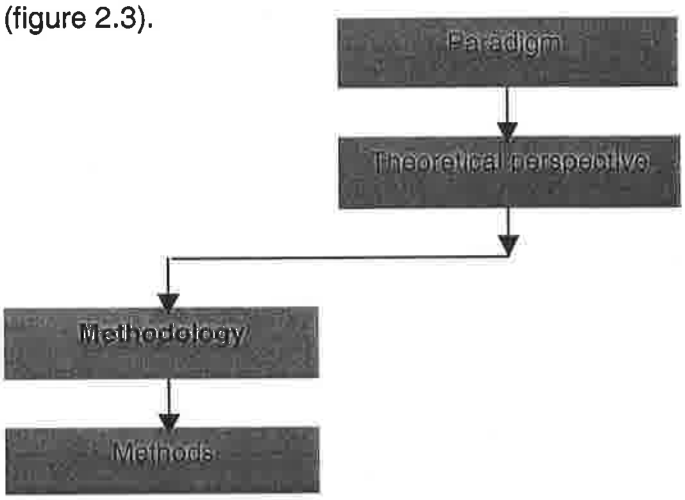

Figure 2.3 Methodology links between the researcher's philosophical stance and methods

On the other hand, focusing more on the role of methodology in linking the research topic with the used methods, Crotty (1998, p.3) defines methodology as *"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".* Confirming this role, LeCompte *et al* (1993 cited Denzin and Lincoln 1998) state that methodology involves a clear focus on the research aims, questions, information that is most appropriate for answering these questions and strategies that are most effective for obtaining this information. Or more simply, research methodology can be described as a practical plan for getting from the point "A" to the point "Z", where "A" is the research aim and "Z" is the sought conclusion (i.e. findings to fulfil the research aim) (figure 2.4).

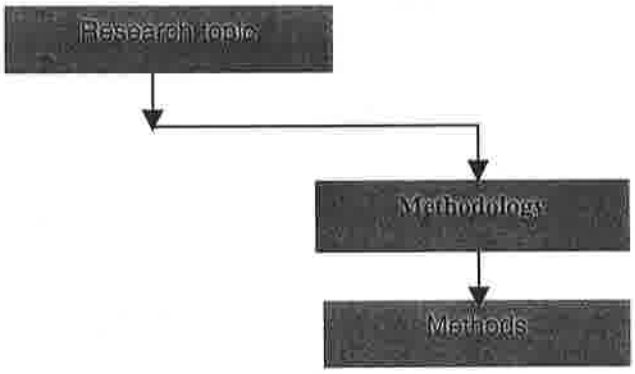

Figure 2.4 Methodology links between the researched topic and methods

To conclude, methodology can arguably be described as a crossroads where more than a linking process take place (figure 2.2). On one hand, it links the researcher's philosophical stance to the practical world, where the specific research methods are situated. On the other hand, it links the research topic and aims to the appropriate methods for fulfilling these aims. Consequently, the applied methodology should be justified for both the philosophical stance and research topic.

2.4.1 Case study methodology

"The use of case studies has become extremely widespread in social research" (Denscombe 1998, p.30). Regardless of the occasional use of the term "case study" as a research method (e.g. Finn *et al* 2000; Crotty 1998), *"any impression that case study research is a method for collecting data is wrong...case study research is a matter of research strategy not research methods"* (Denscombe 1998, p.32), as case studies tend to be a research methodology rather than being a research data-collection method (Hartley 1994). In other words, Yin (2003, p.14) records:

> *The case study as a research strategy comprises an all-encompassing method - covering the logic of design, data collection techniques and specific approach to data analysis. In this sense, the case study is not either a data collection tactic or merely a design feature alone but a comprehensive research strategy.*

In this respect, case studies *"highlight, in particular the choices that we have to make about how many cases to investigate and how these are to be selected"* (Hammersely 1992 cited Denscombe 1998, p.32).

Case study involves the detailed investigation of example(s) - case(s) - of a particular phenomenon aiming to comprehend the examined phenomenon by studying its example(s) (McNeill 1990; Cassell and Symon 1994; Veal 1997; Finn *et al* 2000), with a noticeable advantage in the case of investigating complex phenomena (Yin 2003). Case studies can be designed to examine individuals, long and short-term projects (e.g. special events), organisations, communities or even entire countries (Finn *et al* 2000). The justifications underpinning the usage of the case study are

Justifications regarding the researched topic and aims

- Considering the research aim, which is "to develop a potentially applicable model for managing cultural special events in an Egyptian context...", several justifications support the suitability of using case study to fulfil this particular aim. First, Yin (2003) claims that case study is appropriate mainly for comparing patterns. Consequently, it is appropriate for comparing the events managerial models leading to building the required potentially applicable model. Second, special events often have, by their nature, a managerial frame with clear starting and ending points. Third, one-off management boards usually emerge to manage special events in Egypt. These last two factors support the claim that each event stands as a clearly separate case, which helps to avoid one of the most common problems of case studies: the difficulty of defining the beginning and end point of the case (Yin 2003).
- Managing special events is a complicated process (Getz 1997). Consequently, a methodology that is able to combine a variety of research methods (e.g. observation, interviews, document analysis) and to deal with multiple data sources (e.g. individuals, documents) is required to capture the complex variables under scrutiny. According to Denscombe (1998), this is precisely what case-study methodology offers. Emphasising the same feature, Finn *et al* (2000) record that case study is appropriate for investigating the phenomena that comprise number

of integrated variables, where the massive and complex data available can hardly be tracked by a single method.

- *"Case study is preferred...when the relevant behaviour cannot be manipulated"* (Yin 2003, p.7). Case study is *"concerned with investigating phenomena as they naturally occur, there is no pressure on the researcher to impose controls or to change circumstances"* (Denscombe 1998, p.40). A situation, which emerges within this research, where the researcher has no control over the studied phenomenon, therefore the researcher cannot apply any of the methodologies which require controlling some variables to test others (e.g. experiments).

The compatibility of the case study methodology with an interpretivist theoretical perspective

- Case study gives researchers the opportunity to explore issues in their real context without claiming predefined hypothesis, which means that theory building occurs through the systematic piecing together of evidences generated from the cases themselves (i.e. the researching process) (Yin 2003). According to Lincoln and Guba (1985), Cassell and Symon (1994), Denscombe (1998) and Finn *et al* (2000) this means that case study tends to be inductive and theory-building methodology rather than being a deductive methodology, which is totally compatible with the interpretative theoretical perspective adopted.

In the context of this research, a "multiple, holistic case-study methodology" is adopted. This includes the studying of several cases, where each case is examined as a whole unified unit (i.e. without dividing any case into sub-cases or sub-units). The logic underpinning the adoption of a multiple case study approach is to improve the findings' external validity through triangulation, as *"the evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as being more robust"* (Herriott and Firestone 1883 cited Yin 2003, p.46), whereas the justification for adopting a holistic case study approach is the needlessness for dividing any of the examined cases into sub-cases.

2.4.1.1 The fieldwork

As mentioned before, the research methodology can be described as a practical plan for moving from the point “A” to the point “Z”, where “A” is the research aim and objectives and “Z” is the conclusion (i.e. findings to fulfil the research aim). Thus, the research fieldwork was conducted through an eight-step plan:

1. The first step was to list all the special events carried out in Egypt during 2002 according to the Egyptian special events’ calendar produced by the Egyptian Ministry of Tourism, as it represents the official special events agenda. The calendar included twenty-six special events classified as: 13 sport events, four tourist events and nine cultural events.
2. The second step was selecting the cases, which was based on the “typical instance”. The logic being invoked here is that the selected cases are similar in crucial features; thus, the findings revealed from them are likely to apply to the similar cases (Denscombe 1998). The critical common features in the chosen cases for this research were:

   - Cultural special events: i.e. special events associate with cultural activities as “the event core activity”;
   - Its primary aims are non-financial (e.g. social or cultural aims) and financial aims are indirect or not considered at all;
   - Recurring special events (i.e. not “one-off” events).

   Applying the above-mentioned criteria, four cultural events emerged: Ismailia International Folklore Festival, Aida Opera Performances in Pyramids, the Nile Bounty Festival, and Festival of Sun Perpendicular in Abu Simble. Although this last event is listed on the Egyptian special events agenda, initial investigation showed that no particular managerial procedures were adopted by the event organizers who claimed that the event's characteristics (i.e. a cultural, natural event)[5] minimized the requirement for managerial procedures. Consequently, there was a massive lack of data regarding the procedures applied for organizing Abu Simble Festival, which resulted in this festival being omitted from the research. Thus, all the other three cases were selected.

3. Accordingly, equivalent three Welsh events were selected to match the three Egyptian cases, relying on the Welsh special events list 2002, produced by the Wales Tourist Board. An e-mail was sent to all the listed cultural events (i.e. 23 events), comprising data about (a) the researcher (b) the research topic, aim and plan (c) the type of data sought (d) the three-inclusion criterion which should exist in any selected case and (e) a request for sending any available publications or website address, where information on the event is available. 18 answers were received; seven of them were considered positive (i.e. they confirmed that they met the inclusion criteria and showed interest in the topic and a willingness to offer the required data). Utilizing the initial available data on both the three Egyptian cases and the seven Welsh events regarding the activities and location, new levels of matching were sought, where the three Welsh events, which provide the most similar activities and location to the Egyptian three events, were chosen. Consequently, three Welsh cases were selected (i.e. the Urdd Eisteddfod, Llangollen International Musical Eisteddfod and the Mayfair Festival at the Museum of Welsh Life, St. Fagans).

4. Accordingly, the three Welsh cases were examined by interviewing their organizers (i.e. semi-structured interviews). The interviews were done in two phases. First, the theoretical model concluded from the literature on special

[5] Abu Simble Festival is a one-day event, which takes place twice every year. Ramses II, in a fit of precision and despotic architectural egotism, carefully angled his temple at Abu Simble so that sun would light the inner sanctum up twice a year: once on the anniversary of his rise to the throne, and once on his birthday. Crowds pack in to the temple before sunrise and watch the shafts of light slowly creeping through the stone.

events management (see chapter three) was used as a projective instrument to facilitate investigating the practical models utilized for managing the three Welsh events to enable the identification of congruence and dissonance in the procedures of managing their events. Second, a Delphi technique was adopted to develop consensus on a unified best practice model for managing cultural special events in a Welsh context (i.e. the research second objective).

5. Then, the three Egyptian cases were examined through an investigation of all the relevant documents (i.e. document analysis) aiming to explore the practical models utilized for managing these events. The three Egyptian models were then compared against the unified Welsh best practice model to identify the managerial dissimilarities.
6. The managerial dissimilarities were then discussed with the Egyptian events practitioners (i.e. semi-structured interviews) to explore whether they represent actual managerial problems to which the failure of some of the Egyptian culture events could be attributed (i.e. the research third objective).
7. A theoretical guide about the procedures for managing the Egyptian problem areas was then used as a projective instrument to simulate discussion with the Welsh practitioners (i.e. semi-structured interviews). The discussion led to developing the theoretical guide into a Welsh best practice guide (i.e. the research fourth objective).
8. The Welsh best practice model and guide were used as projective instruments to stimulate discussion with the Egyptian practitioners (i.e. semi-structured interviews) to develop consensus on a potentially applicable Egyptian model and guide to cultural events management (i.e. the research fifth objective).

2.4.1.2 Generalization from case studies

Generalization from case studies is one of the main areas where debate usually emerges. In this regard:

> *Understanding the distinction between these two types of generalization* [analytic and statistical generalization] *may be your most important challenge in doing case studies...statistical generalization is the less relevant one for doing case studies. In statistical generalization, an inference is made about a population (or universe) on the basis of empirical data collected about a sample...this method of generalizing is commonly recognized because research investigators have ready access to formulas for determining the confidence with which generalizations can be made, depending mostly on the size and internal variation within the universe and sample. Moreover this is the most common way of generalizing when doing surveys...A fatal flaw in doing case studies is to conceive of statistical generalization as the method of generalizing the results of the case studies. This is because your cases are not "sampling units" and should not be chosen for this reason. Rather individual case studies are to be selected, as a laboratory investigator selects the topic for a new experiment...under these circumstances, the mode of generalizing is "analytic generalization" in which a previously developed theory is used as a template with which to compare the...results of the case study.*
>
> (Yin 2003, p.32)

Thus for building an analytic generalization:

> *An important step...is the development of a rich, theoretical framework* [i.e. the theoretical model]. *The framework need to state the conditions under which a particular phenomenon is likely to be found...the theoretical framework later becomes the vehicle for generalization to new cases.*
>
> (Yin 2003, p.47)

In this context, a theoretical model for managing cultural special events was concluded out of the extensive literature on special events. This model was used to represent the managerial procedures under which cultural special events should theoretically be organized. Subsequently, the theoretical model was developed into a Welsh best practice model, which was then evolved into an Egyptian potentially applicable model (i.e. the vehicle for generalization to new cases). Finally, *"the extent to which findings from the case study can be generalized to other examples in the class depends on how far the case study example is similar to others of its type"* (Denscombe 1998, p.36).

2.4.2 Methods of research

This study uses Strauss and Corbin's definition (1998, p.3) that methods are *"a set of procedures and techniques for gathering and analyzing data"*. The methods used within this research are document analysis and semi-structured interviews associated with both Delphi and projective techniques.

2.4.2.1 Document analysis

"The bureaucratization of industrial society has created a wealth of documentation in relation to administration, policy, management, finance and commerce. These provide an abundant source of data for social researchers in whatever field they operate" (Denscombe 1998, p.161). As a result, through the history of social research, documents have been widely employed as a competent data-collection method. *"For example, in sociology, Marx, Durkheim and Weber worked primarily from documents; similarly, Chicago school sociology was often based on written documents"* (Hammersley and Atkinson 1995 cited Punch 1998, p.190). Documents, as a data-collection method, include gathering data from sources such as books, journals, official records, essays, personal notes (e.g. letters, diaries) and visual documents (e.g. films) (Jupp 1996 cited Punch 1998), where documents

> *Rather than act as an introduction to the research...take on a central role as the actual thing that is to be investigated. In this sense, documents can be treated as a source of data in their own right - in effect an alternative to questionnaires, interviews or observation.*
>
> (Denscombe 1998, p.158)

In this context, a two-way typology for documents, based on authorship and accessibility, is commonly applied (e.g. Scott 1990; Punch 1998; Hodder 1998 cited Denzin and Lincoln 1998).

> *Authorship refers to the origin of the document (personal, official-private, official-state), while access refers to the availability of documents to people other than the authors (closed, restricted, open-archival and open-published).*
>
> (Punch 1998, p.191)

In the respect of this research, the investigated documents can be classified as "official-state, restricted documents", as all the researched documents were governmental (i.e. official-state) signed and dated documents; and are not openly accessible but permissions are required from governmental entities (i.e. restricted). The justifications of utilizing document analysis within this research are:

- Accessibility: as the researcher is sponsored by the Egyptian Government to conduct this particular research, the researcher has a guaranteed access to all the available official documents about special events in Egypt, which facilitates utilizing documents as a data-collection method.
- Sufficiency: governmental bureaucratization usually leads to comprehensive documentation; a situation, which robustly exists in the Egyptian special events organized by governmental entities, where all the managerial procedures are routinely and inclusively documented in detail.
- Official documents usually provide data which can be described as:
  - *"Authoritative. Since the data have been produced by the state, employing large resources and expert professionals, they tend to have credibility"* (Denscombe 1998, p.163).
  - *"Factual: in the case of statistics, they take the form of numbers that are amenable to computer storage/analysis, and constitute "hard facts" around which there can be no ambiguity"* (Denscombe 1998, p.164).
  - Dated and systematically well-organized: which facilitate developing a chronological model of the managerial procedures for organizing special events in Egypt. This is of special importance, considering the complicated and massive procedures taking place in parallel.

The fieldwork

As mentioned above, three Egyptian cases were selected to explore the managerial models utilized for organizing cultural special events in Egypt (i.e. the research third objective). All the three Egyptian cases were examined through analysing the official documents related to each case. In this context, an official letter from Helwan University, Cairo (i.e. the Egyptian Ministry of Scientific Research and High Education) was used to facilitate accessing the documents. All the documents were investigated inside the governmental offices with no restrictions regarding approaching any of them.

Nile Bounty Festival (NBF): The documents related to the managerial procedures for organizing the NBF were traced between the Ministry of Tourism (the Conferences and Special Events Department) and Cairo Governorate (the Regional Association for Tourist Promotion and the Governorate General Secretary). Data were culled from the documents relating to the NBF 2002.

Ismailia International Folklore Festival (IIFF): The documents related to the managerial procedures for organizing the IIFF were obtained from the Ministry of Culture (Cultural Palaces Department) and Ismailia Governorate (the Regional Association for Tourist Promotion). Data were culled from the documents relating to IIFF 2002.

Aida Opera Performances, Pyramids (AOPP): The documents related to the managerial procedures for organizing the AOPP were obtained from the Ministry of Culture (the Egyptian Opera House Association). Data were culled from the documents relating to AOPP 2002.

All the documents were chronologically listed according to the printed date on them. Documents sharing the same date were listed according to their sequence in the original holding files. Afterwards, all the documents were coded aiming to facilitate defining the data included in the documents; *"coding in thematic analysis…is the process of identifying themes or concepts that are in the data"* (Ezzy 2002, p.86). Thus five titles were used for coding, which are: date, by whom, to whom, topic (e.g. 29/8/2002: a letter from the organizing board to the Egyptian Association for Tourist Promotion asks for 25,000 EGP as a financial support) and the supposed managerial area (e.g. finance). The aim of this initial coding, which is entitled *"open coding"*, is to *"generate an emergent set of categories and their properties"* (Glaser 1978 cited Ezzy 2002, p.88). Subsequently, a second coding process was made using three headings: date, the topic summary and the supposed managerial area (e.g. 29/8/2002: a request for financial subsidy, finance). The aim of this second coding, which is entitled *"axial coding"*, is *"to integrate codes around the axes of central categories"* (Strauss and Corbin 1998 cited Ezzy 2002, p.91). However, most of the examined documents were already titled either as a part of the original document or the headings were latterly added by the responsible employees as a part of a sorting process for administrative reasons (e.g. a request for financial subsidy) and all of them were, as previously mentioned, signed (e.g. signed by the financial manager), which facilitated defining the proper "summary of the topic" and the related managerial area. Where no actual heading emerged, words from the document itself were used as a heading as far as possible, for example, when the open coding was:

> 26/8/2002: A letter from the Cultural Regional Department to the organizing board states the expenditure aspects of the folklore shows, which include: the artists expenses, transportation, equipment, promotion, renting the stage, participants transportation, participants pocket money and miscellaneous expenses.

The axial coding was:

> 29/8/2002: the expenditure aspects of the folklore shows, finance.

Subsequently, The central categories were inducted from the axial coding to conclude the major managerial procedures, which were conducted for organizing each case separately (e.g. finance, marketing, implementation), leading to designing a chronological managerial model for each case.

Finally, it should be mentioned that the documents were written in the Arabic language. Thus, the data quoted from them were afterwards translated into the English language. Considering that all the examined texts were official documents, all the documents were written in formal Arabic, which facilitated applying word-to-word, literal translation. The translation accuracy and credibility was boosted by "collaboration with other bilingual researchers", as the translation was revised by a bilingual (i.e. Arabic and English) researcher selected by the research supervisors.

Analysing the documents

Within this research, the examined documents were analysed according to the thematic analysis' basis, which is appropriate when adopting an inductive approach (Ezzy 2002). Describing the main features of the thematic analysis, Ezzy (2002, p.88) states that:

> *Thematic analysis aims to identify themes within the data. Thematic analysis is more inductive than content analysis because the categories, into which theme will be sorted, are not decided prior to coding the data. These categories are "inducted" from the data. While the general issues that are of interest are determined prior to the analysis, the specific nature of the categories and themes to be explored are not predetermined. This means that this form or research may take the researcher into issues and problems he or she had not anticipated.*

Within the documents' thematic analysis, there are various levels of meanings analysis: *"analysis can focus on the surface or literal meaning, or on the deeper meaning and the multi-layered nature of meaning"* (Finnegan 1996 cited Punch 1998, p.232). Defining the level of meanings analysis to be applied relies on several elements: (a) the nature of the investigated topic (e.g. a psychological research may prefer to depend on the multi-layered meaning) (b) by whom and to whom the documents were sent (Punch 1998) (e.g. letters between politicians can hardly be analysed using literal meanings) and (c) the context within which the documents were produced as *"documents and texts studied in isolation from their social context are deprived of their real meaning"* (Punch 1998, p.231). However, official routine correspondence hardly ever composes hidden, ambiguous or deeper meanings, therefore, in the context of this research, surface or literal interpretation, which is the simplest level, was applied for interpreting the investigated documents.

Document evaluation

A "four-element" criterion can be suggested for evaluating the researched documents, which are: authenticity, credibility, representativeness and clarity of meaning (e.g. Scott 1990; Jupp 1996; Punch 1998).

- "Authenticity" related to whether the researched documents are original, copies or even fakes. Within this research, all the used documents are genuine, official, signed and dated documents, which assumes high authenticity.
- "Credibility" considers whether the documents are accurate and free from bias or not. Despite the fact that all the documents were produced by governmental employees who have direct benefit in claiming the efficiency of all the applied managerial procedures, a situation which reinforces the possibility of bias; several justifications show that the documents' credibility can be considered high: (a) due to the Egyptian administrative hierarchy, a significant percentage of the researched documents are signed by more than an employee, which reduces the likelihood of both deliberate and unintentional mistakes (b) all the investigated documents are official correspondence between governmental entities; therefore deliberate bias would be considered an administrative crime according to the Egyptian administrative law; (c) the absence of SMART objectives and evaluation criterion for the Egyptian special events, as shown later (see: 5.5.2 and 5.5.7), eliminates the employees' commitment to serve specific quality or to achieve well-defined aims; therefore, the motive for bias

fades considerably; (d) all the documents were produced during the period of managing the events (i.e. they were not subsequently edited), which minimizes the possibility of faking or re-writing the facts afterwards.

- “Representativeness” discusses whether the documents symbolize the totality of its class or not. Due to the Egyptian bureaucratization, all the documents should be retained for official usage, which guarantees the existence of all the related documents. On the other hand, the nature of special events requires a central entity to manage the whole process, which again guarantees gathering the related documents often in a single entity (i.e. the organizing entity), which supports the representativeness of the documents.
- “Clarity of meaning” considers whether the meaning of the text is clear and unambiguous or not. As mentioned before, official correspondence does not commonly use hidden indications, double-meanings, ambiguous or subtle codes.

Consequently, it could be claimed that the utilized documents provide significant authenticity, credibility, representativeness and clarity of meaning.

2.4.2.2 Semi-structured interviews associated with the projective and Delphi techniques

One-to-one, semi-structured interviews with special events' practitioners in Wales and Egypt were utilized, in association with both projective and Delphi techniques, to fulfil the second, third, fourth and fifth objectives of the research (see chapters four and six).

The semi-structured interviewing

Semi-structured interviews combine the flexibility of the unstructured interviews with the comparability of the structured interviews (Preece 1994; Flick 1998; Finn *et al* 2000). Thus, certain topics can be investigated, by asking analogous questions, for gathering comparative data. At the same time, the researcher can alter the sequence of topics to probe for more information (Gilbert 1993). In addition, the interviewees are allowed to develop their own ideas and to pursue the thoughts, they believe to be associated with the researched issue (Denscombe 1998). Thus, semi-structured interviews are useful when *"the aim is to elicit respondents' ways of thinking about the issues with which the researcher is concerned"* (Bryman 1989, p.146). Contacting the experts in both Wales and Egypt was done through one-to-one, semi-structured interviews. The rationales underpinning the use of this method within this research are:

- The above-mentioned features of the "semi-structured interviews" enrich the research findings and support the philosophical and methodological stance adopted previously, as they allow the interviewees to develop their ideas and pursue their thoughts liberally.
- Considering the facts that: (a) different managerial models can be utilized to organize an event; (b) each model contains several managerial areas (e.g. planning, implementation); (c) a significant part of these managerial areas cannot readily be investigated from outside (e.g. the financial system, the decision making procedures), consequently, the data collected is expected to require deep investigation and to vary considerably. Thus, collecting such data necessitates a method, which can: (a) deal with massive amounts of data; (b) elucidate the data in-depth and through direct communication; (c) offer flexible ways of expression, which can absorb the unanticipated data rather than being confined to pre-determined answers, or to be simply reported in few words. However, semi-structured, one-to-one interviews can efficiently meet these needs (Oppenheim 1992; Rubin and Rubin 1995; Seale 1998).
- One-to-one interviews are the most common form of semi-structured interviews. On one hand, it is relatively easy to arrange and control. On the other hand, the opinions expressed throughout the interview stem from one source (i.e. the interviewee), which makes it fairly straightforward for the

researcher to locate and develop specific ideas with the interviewees (Denscombe 1998).

- Semi-structured interviews usually tend to discover new thoughts rather than to check previous ideas (Bryman 1989; Denscombe 1998) so it copes with the philosophical and methodological stances, which had been previously adopted and in addition to achieve the aim of the research.

The projective techniques

Projective techniques are widely used in clinical and forensic settings (Lilienfeld *et al* 2000) and increasingly in consumer research and marketing (Chang 2001). However, no evidence of utilizing this technique in special events research is available, despite being used in relation to tourism management (e.g. Westwood 2004). A projective technique is *"a situation or stimulus used to encourage respondents to project part of themselves or an idea system onto an external object, thus revealing opinions and feelings more deeply than if questioned directly"* (NOP World 2004). Thus, projective instruments, such as visual models (e.g. the theoretical and the Welsh best practice model for managing cultural special events), pictures or sounds, can be provided for the interviewees (e.g. the Welsh and Egyptian practitioners) to facilitate the articulation of the researched issues (e.g. cultural special events management).

The projective techniques are particularly useful when discussing new or uncommon areas (e.g. modelling cultural special events) as it encourages the respondents to reveal ideas, experiences and tacit knowledge, of which the respondent is otherwise unaware (Executive Solutions 2004). Lilienfeld *et al.* (2000) identify five types of projective techniques: completion; association; construction; arrangement/selection and expression. The projective instruments developed here would best be categorised alongside the construction type, where the interviewees use the projective instrument (i.e. the theoretical model or the guide to best practice) as a base from which to construct their own thoughts, and *"to engage in a complex, cognitive activities that go far beyond mere association"* (Lindzey 1961 cited Hassay and Smith 1996, p. 510), which could be useful for evolving or improving ideas. Finally, Lindzey (1961 cited Hassay and Smith 1996) claims that the construction techniques are most appropriate to evoke a profusion of responses regarding the respondent's unconscious factors (e.g. the Welsh practitioners' unawareness of the possibility of modelling the procedures of cultural special events management). The justifications of adopting the projective technique within this research are:

1. The projective instruments are developed mainly to motivate the interviewees tracing their own tacit knowledge, of which they are unaware and have not discussed before. This situation typically emerged in relation to the Welsh and Egyptian practitioners, who despite the incremental experience they had gained were completely unaware of the potential for embodying their own thoughts in a comprehensive model for managing cultural special events.
2. Using the projective techniques, the Welsh interviewees, on one hand, were invited to build on the theoretical model and to tell the story of their event detailing when and how their event differed from the model. In contrast, the Egyptian practitioners were invited to build on the Welsh best practice model and to suggest what they believe to be necessary modifications to put this Welsh model into a form potentially applicable in an Egyptian context. In this regard, it could be noted that the projective techniques enabled the construction and the development of a rich picture of special event management. Thus, it could be claimed that applying the projective techniques to this research enables building up from data to theory (i.e. from the literature review to the potentially applicable Egyptian model), which is compatible with the inductive approach adopted in this study.

The Delphi technique

Delphi technique, named after the classical Greek "Delphic" oracle (Strauss and Zeigler 1975), is a well-established technique for building experts' consensus. In more detail, Delphi technique is *"a class of qualitative models"* (Xie and Smith 2000, p.17), which involves the gathering of information from a group of experts on a specified issue where each expert states separately her or his opinion. These opinions are then analysed, summarized and circulated to those experts again for further comments, where the experts are asked to declare which opinion they think to be the most appropriate and if they want to modify their ideas in the light of the other experts' opinions. This process might be repeated a number of times, depending on the extent to which the initial opinions are similar, before a final consensus can be built (Linstone and Turoff 1975 cited Green *et al* 1990; Veal 1997; Bramwell and Hykawy 1999). The justifications of employing Delphi technique in this research are:

1. Delphi technique is a method for obtaining the experts' opinions without necessarily gathering them (Stuter 1998). Thus, the Delphi technique facilitates gathering experts' opinions from a wide geographical area (e.g. Egypt).
2. Delphi technique is a program of sequential, individual interrogations, interspersed with information feedback on the opinions expressed by the experts in previous rounds. In such a context, Delphi technique tends to be a theory or model-building approach where a process of adding and removing is continuously taking place aiming to establish consensus, which can be taken as a solid base for forming a theory or a model. This feature supports and fits with the inductive methodological approach adopted in this research. This supports, as well, the claim that constructionism appears to have most to offer in terms of understanding the epistemological basis for the Delphi technique (Hanafin 2004).

The fieldwork

A series of semi-structured interviews were conducted with Welsh and Egyptian special events experts where the theoretical model was initially utilized as a projective instrument to stimulate respondents to project their ideas on cultural special events management. Alongside the theoretical model, a carefully prepared checklist of topics was used to make sure that the required ground was covered; nevertheless, the questions reflecting these topics were shaped according to the circumstances of each particular interview, with a significant flexibility in terms of (a) the order in which topics were investigated and developed, and (b) the interviewees' capability to build up new ideas, which they think related to the discussed streams. First, the organizers of the three Welsh events were interviewed initially in association with the projective technique and later with the Delphi technique to investigate the managerial practical models utilized for organizing cultural special events in Wales to achieve a consensus on a best practice model for managing cultural special events in a Welsh context (the second objective of the research – see chapter four).

Second, the organizers of the three Egyptian events were interviewed to discuss the eight managerial dissimilarities (which resulted from the comparison between the three Egyptian practical models and the Welsh best practice model) aiming to explore if or not these dissimilarities represent actual managerial problems to which the failure of some of the Egyptian culture events can be attributed (the third objective of the research – see chapter five).

Third, the Welsh practitioners were interviewed to discuss the theoretical guide with the Welsh practitioners aiming to develop it into a best practice guide in a Welsh context (the fourth objective of the research – see chapter seven). Finally, the Egyptian practitioners were interviewed in association with projective techniques and the Delphi technique to discuss both the Welsh best practice model and guide with the Egyptian practitioners aiming to develop an Egyptian consensus on a potentially applicable model and guide of relevant cultural events management (the fifth objective of the research – see chapters six and seven). All the interviews took place in the interviewees' offices and were recorded with the permission of each interviewee.

Finally, it should be mentioned that the interviews with the Egyptian organizers were conducted in the Arabic language. Thus, the data quoted from them were afterwards translated to the English language. Considering the fact that colloquial Arabic was used during the interviews, literal translation was inapplicable. Thus, conceptual translation was applied. The previously mentioned technique (i.e. collaboration with other bilingual researcher) was utilized again to boost the translation accuracy and credibility.

2.5 Summary

This chapter focused on illustrating the researcher's philosophical stance and the research practical stance. In this respect, the chapter referred to the four levels, which jointly build the research approach hierarchy. The chapter then investigated each level separately. In relation to the researcher's paradigm, the chapter investigated the epistemological and ontological premises, focusing on constructionism as an epistemology and relativism as an ontology. The chapter then investigated the theoretical background of the case studies as a methodology, before illustrating the practical usage of the case studies within the research. Finally, the chapter investigated in detail the methods utilized within the research (i.e. the semi-structured interviews and document analysis). Those methods were researched theoretically to demonstrate the link between the utilized methods and both the research topic and the researcher's philosophical stance. Finally, the chapter referred as well to the practical procedures in which the methods were utilized.

Chapter three

Literature review

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3.3	Decision phase	3.5
3.4	Planning phase	3.11
3.5	Implementation phase	3.46
3.6	Outcome evaluation phase	3.50
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3.1 Introduction

This chapter provides the theoretical framework of the study aiming to achieve enhanced understanding of the procedures of managing special events. In this respect, the chapter applies a relabelled project managerial cycle of four phases, namely: decision, planning, implementation and outcome evaluation, to act as an organizing framework for the analysis of the extensive literature on special events management. These four phases are researched in detail to build a unified theoretical model for managing special events. However, despite the extensive literature on special events management, some areas (e.g. implementation and evaluation) are not well recognized, whilst other areas (e.g. the catalyst's role, idea selection, decision-making and staff structure) are almost neglected. In order to form the theoretical model, the study supports these less-acknowledged areas through: first, investigating the literature specified in these areas (e.g. HRM); second, examining the literature related to the tourism and leisure management. The texts derived from other disciplines are modified to fit the special events context. Consequently, a unified theoretical model for managing special events is developed to be used as a projective instrument to stimulate discussion and facilitate data collection in the semi-structured interviews with the Welsh practitioners (see chapter four).

3.2 Special events Project Cycle Management

"Although events vary" (Watt 1998, p.4) and despite the thought that *"each person brings his or her personal management style into play"* (Catherwood and Van Kirk 1992, p.5), *"most of them* [special events] *follow the same vital stages of organization"* (Watt 1998, p.4). The initial issue would then be to identify these vital managerial stages, or what Shone and Parry (2001, p.198) call *"the critical tasks"*, which are required for managing a special event. In this respect, several authors believe that *"a special event or festival comes under the general term of a project"* (McDonnell *et al* 1999, p.344); and consequently, special events could be managed from the

perspective of project management. For example, Shone and Parry (2001, p.195-196) claim *"the management of a project covers much the same process as the management of events...[and] there are considerable similarities between the management of projects and the management of events, so...techniques developed in the management of...projects could be used to bring organizational discipline to many kinds of events"*; whilst, Getz (1997, p.75) notes that *"project planning and management methods can also be used to create and launch a new...event, or a program within an existing event"*.

In respect of special events management, several authors provide relatively similar managerial models. For instance, Youell (1994, p.107) suggests a five-phase model consists of *"pre-feasibility, feasibility, planning phase, the event; and evaluation"*. The American Sport Education Program (1996, p.vi) adopts a three-phase simple model includes: *"plan, implement and evaluate"*. Goldblatt (1997, p.31) suggests a five-phase model comprising: *"research, design, planning, coordination and evaluation"*. Getz (1997, p.76) recommends a more complicated eight-phase model, which consists of: *"concept or intent to bid; feasibility study; decision to proceed or cease; preliminary plan; detailed planning; implementation; the event and wind-up; shut down"*. Based on Getz's model, Allen *et al* (2002, p.99) develop a seven-phase model, which includes: "*development of event concept or intent to bid; feasibility study; decision to proceed or cease; planning and implementation; the event; shutdown; and evaluation and feedback"*. McDonnell *et al* (1999, p.274) suggest a three-phase cycle comprises *"planning, implementation and evaluation"*. Finally, Shone and Parry (2001, p.196) suggest a five-phase model comprising *"objectives and getting started, planning, organizing and preparing the event, implementing (running the event), and divestment/legacies"*.

In this respect, aiming to achieve enhanced understanding of the extensive literature on special events a simple, fundamental, relabelled Project Cycle Management (PCM) comprising the four basic stages: decision; planning; implementation; outcome evaluation (Corbett 2003), is used as an organizing framework. Summarizing those four basic phases, Corbett (2003, p.1) records that *"we review the thinking to decide if the project goes ahead. We review the plan to see if it is feasible, we monitor the progress as it is undertaken. At the end we evaluate what has been achieved and decide what we can learn for next time. Allowing us to move on to the next project, taking with us the knowledge and experience we have gained along the way".* This PCM model is selected as it provides the simplest base on which almost all the following models are built on. However, in the terms of special events management, a similar four-phase model was utilized by Torkildsen (1993, p.7.6), who reveals that:

> *In terms of management approaches, the similarities of different events appear to be greater than the differences. While policies, programme and content will differ, a planning sequence is the same for all: decision making, planning and preparation, presentation and evaluation.*

Consequently, a simple relabelled PCM model consists of the four basic phases namely (figure 3.1): decision, planning, implementation and outcome evaluation will be adapted to facilitate illustrating the managerial theoretical procedures for managing special events.

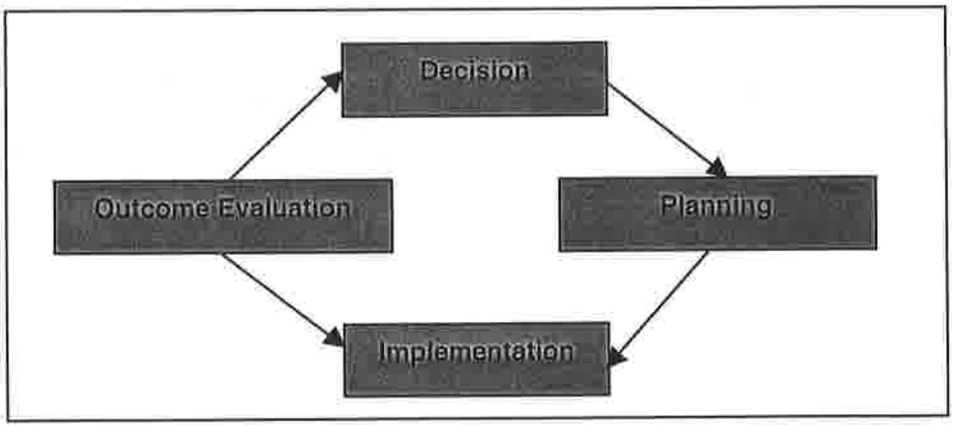

Figure 3.1: A relabelled PCM model (adapted from Corbett 2003)

3.3 Decision phase

A decision phase is usually required to determine the likelihood of fulfilling the event aims. The decision phase can be fairly simple, especially for recurring events where previous experience (e.g. the event previous success) can justify the decision; but can also be a multifaceted process. At its most complex, the decision phase comprises seven areas (figure 3.2): the event catalyst, identifying the event idea, establishing the management board, forming aims and objectives, forming the event initial features and outlining feasibility study. The previous six procedures combine to provide a primary vision of the potential event, and inform the seventh procedure, which is the decision-making.

3.3.1 The special event catalyst

Despite the extensive literature on special events, the role of the event catalyst has not been referred to yet. The catalyst can arguably be defined as the original provider or the re-innovator of the event's idea. The catalyst is not necessarily an event expert and may emanate from the public, private or voluntary sector (e.g. local authority, firm, individual). The catalyst's role may be limited to suggesting the event idea (e.g. the Mayfair Festival, the museum of Welsh life) or expand to forming the event Management Board (e.g. the Urdd Eisteddfod) or identifying the event aims (e.g. Aida Opera Performances, pyramids).

3.3.2 Identifying the special event idea

Generating the event idea is also one of the areas, which is less well recognized in the literature on special events management. In addition to the catalyst, ideas for special events can be generated via several sources, such as the Management Board and staff members or feedback from previous or potential customers or sponsors (i.e. market research). However referring to the importance of the group work and brainstorming for creating significant ideas, McDonnell *et al* (1999, p.49) record that *"most good events emerge from a synergistic group process".*

3.3.3 Establishing the Management Board

The Management Board needs to reflect a diverse range of skills and expertise, which may be vested in one or more individuals to cover all the aspects of event management, such as marketing, finance and HRM, although *"titles are often used loosely"* (Getz 1997, p.12). Depending on the event scale, the Management Board may manage the event through a group of executive committees. The Management Board typically comprises:

Event manager - chief executive, executive director and event coordinator are all synonyms for the same individual: an appropriately skilled person, whose responsibility is to lead the event management process through all its different phases (Youell 1994).

Marketing manager - is essential for resolving marketing issues, such as planning the market research and promotional activities, and for working jointly with the financial advisor to set prices and secure sponsorship (Catherwood and Van Kirk 1992).

Financial manager - whether the event is "for-profit" or not, a financial manager is vital to predict income and expenditure, to forecast cash flow, to monitor the financial situation and to manage the financial reporting (Catherwood and Van Kirk 1992).

Legal advisor - rarely emerges in small events. The legal advisor's duties might be enormous in case of mega events (e.g. the Olympic Games), where they include dealing with the contractual issues and lawful procedures (Catherwood and Van Kirk 1992).

Sponsor's representative - major sponsors often have representatives to look after their interests in the event, to enhance the link with the event and resolve any problems arising.

Specialist consultants - from different fields (e.g. sport, music, art, history) may be invited to manage specific areas as required.

3.3.4 The special event aims and objectives

The event aims and objectives are crucial and must be resolved early as they impact on almost all the event's aspects. At best, the event aims will be identical to those of the event organization, but at least they must be complementary, fitting with the organization's aims and having a key role in achieving them (Watt 1998). However, event managers must distinguish between the aims of the event and the aims of the event organization, and then recognize that their duty is to fulfil the event aims, which may fall into one of three main categories: economic, political, cultural and social.

Economic aims are usually inevitable for almost all special events, even "not-for-profit" events, although they might not be the first priority and may be confined to achieving a "break-even" situation. Economic aims could be direct (e.g. stockholders' monetary profit) or indirect (e.g. marketing a product). They could be short-term (e.g. increasing visits) (Dwyer *et al* 2000), or longer-term, (e.g. marketing an entire country). On the other hand, cultural and social aims may focus, as early mentioned (see: section 1.3), on increasing awareness of a tradition or socio-cultural value, boosting civic pride and community satisfaction, satisfying the needs of special interest groups or conserving local heritage (Waters 1994), strengthening values such as volunteerism (Getz 1997), and galvanizing particular segments of society (Farber 1983; Ritchie 1984). Few researchers investigate the special events political aims and impacts; this may be due to the difficulty *"in obtaining appropriate data from government authorities and significant individuals who may be sensitive about the results of such research"* (Hall 1992, p.88), as well as, the difficulty of designing criteria for evaluating the political outcomes. As earlier mentioned (see: section 1.3), special events can be used *"at both the macro- and micro-political level"* (Hall 1992, p.88). Macro-politically, events can, for instance, help enhance the country's international image (Hall 1992). Micro-politically, events can be utilized to strengthen the elites' local position (Hall 1992), promote political ideology (e.g. the 1936 Berlin Olympic Games) or reduce tension.

Special events' aims express generally what should be achieved without providing detail. Thus, aims are usefully broken down into objectives (Doran 1981) - the steps conclude to achieve aims (Shone and Parry 2001). *"Objectives should be SMART"* (Watt 1998, p.10), i.e. **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-bound (Doran 1981; Watt 1998; Platt 2001). SMART objectives are key to effective event management, notably the event evaluation process. Economic objectives, for example, may specify volume of income, profit, ticket sales, sponsorship; number of local or international visitors. A combination of economical, social, cultural and political aims and objectives is usually common. Finally, Shone and Parry (2001) claim that objectives should be the starting point for the special event management process.

3.3.5 Forming the special event initial features

Relying on the event idea, aims and objectives the Management Board can move on to form the event initial features. This area discusses initially the blend of elements, which will be introduced under the event title. Each event has its blend regarding the type, size, theme, venue, activities, sponsors, etc, which jointly form the event (Xie and Smith 2000). A wide diversity of events emerges concerning the event type (e.g. cultural, social, sport), size (from mega events to local festivals in small villages), theme (e.g. ethnic, historical), venue (e.g. indoor, outdoor), etc. Each choice will obviously influence the event overall appearance. Questions related to "what" (e.g. what are the event idea, aims, type, theme, activities), "where" (e.g. where will the event be held), "when" (e.g. when will the event be held) and "who" (e.g. who are the potential sponsors, markets) can help formulate the event initial features (Allen 2000). More questions can be appended to the list for more clarification; but it should be apparent that all the answers are preliminary and changeable except the "red line" features, if any, which must be specified early (e.g. the theme or the central activity). Despite Watt's (1998, p.4) statement that *"if you can't answer them all* [the questions], *it may be best not to start"*, it would be optimistic to expect that the board would be able, in this early stage, to answer all the questions precisely and definitely.

3.3.6 Outline feasibility study

An outline feasibility study checks that the event is viable; and it does not need detailed answers - a broad indication of likely success or failure is sufficient. For a small event, the feasibility study may be relatively informal and may just involve a *"chat with a colleague"'* (Watt 1998, p.8), but for larger events *"it requires investigating the project's potential budget relying on the results of a market research to provide efficient database for facilitating and justifying the decision-making"* (Salem 1998, p.21). Finally, Allen *et al* (2002) records that feasibility study tends to include market research and initial financial study.

3.3.6.1 Market research

Market research is vital for special events as its outputs provide a robust foundation for decision-making and detailed planning. The significance of market research emerges from the fact that the smaller the quantity or the inferior the quality of the data available, the higher the possibility of failure (McDonnell *et al* 1999). Moreover, *"the better research you conduct prior to the event the more likely you are to produce an event that matches the planned outcomes of the organisers"* (Goldblatt 1997, p.31). Finally, defining the data required from the market research, in primary or secondary terms, is a key issue. Secondary data supported by the practitioners' experience is arguably suitable for recurring, and small events, bearing in mind, the relatively low cost, less time and efforts it usually necessitates to be conducted. However, market research is investigated in detail in chapter seven (sections 7.2.5; 7.3.4; 7.4.4).

3.3.6.2 Initial financial study

Whether it is a "for-profit" or "not-for-profit" event, detailed financial investigation should be conducted within the planning phase. In addition to this, an initial financial study includes a preliminary study of the potential income and expenditure should also be concluded within the decision phase (McDonnell *et al* 1999). The rationales underlying this initial study are: first, the financial outcome is a key measure when making decisions. Second, early determination of financial non-feasibility can minimize wasted time, money and effort (Salem 1998). Third, early financial implications can lead to early modification to the event features, notably the event activities, venue and most commonly, ticket price. Finally, a significant part of the data used in an initial financial study (e.g. anticipated number of attendees, venue costs) is likely to be secondary data from previous or similar events. However, both initial and detailed financial studies are going through the same course of procedures, which are discussed in detail in section 3.4.2.1. The main difference between the initial and the detailed financial study is the scale of the study as no detailed answers are expected out of the initial financial review but just indications of financial feasibility.

3.3.7 Decision-Making

At this point, the Event Management Board needs to have collected enough data to decide whether the event should go ahead to the detailed planning phase or not. One of three conclusions is expected. First, if the data shows that the event is likely to fulfil its aims, the event should then progress to the planning phase. Second, if the data shows that the event is unlikely to fulfil its aims, the event proposal should then be disapproved and a report should identify the obstacles preventing the event progression. Third, if the data shows that the event is likely to fulfil its aims if major or minor modifications are done, the next step should then be repeating the decision phase, or moving to the planning phase bearing in mind the suggested refinements. Finally, Getz (1997) refers to the decision phase as the "formative evaluation"; whilst

McDonnell *et al* (1999) and Allen *et al* (2002) named it the "pre-event assessment". Figure 3.2 illustrates the special events decision phase.

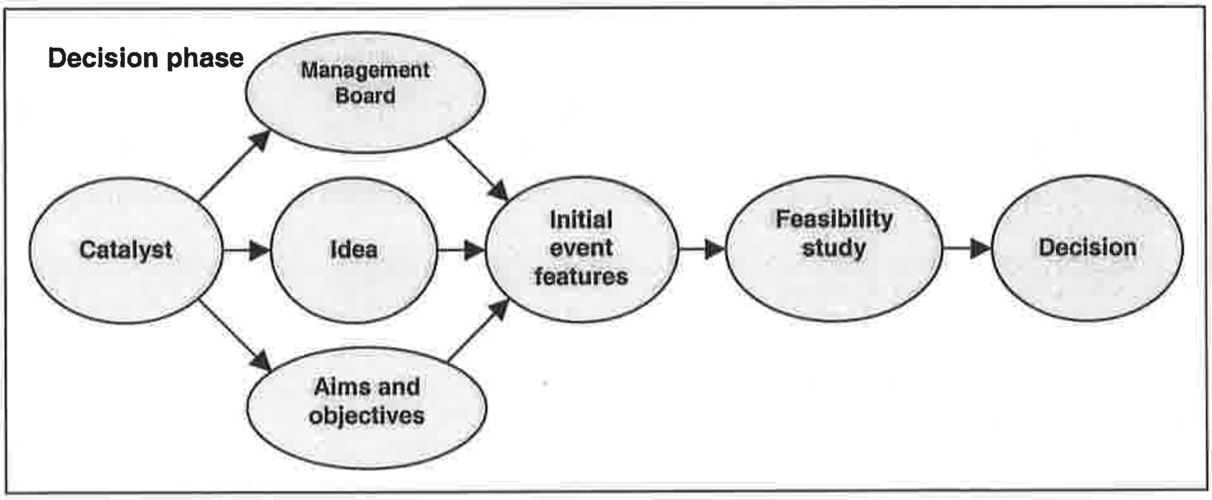

Figure 3.2: The special event decision phase

3.4 Planning phase

Following a positive outcome from the decision phase, the event moves into the planning phase, which is the essence of managing the event. Planning includes five managerial areas (figure 3.6). At the beginning, the event definition and the detailed financial study form an iterative cycle, before moving onto three parallel activities namely: forming the event logistics, human resource management and marketing.

3.4.1 Event product definition

Due to the multifaceted nature of the special events, providing a comprehensive definition for the term "product" might be problematic. In an attempt to overcome this problem, McDonnell *et al* (1999, p.108) state that an event product *"encompasses all the elements which make up the festival or event"*. Watt (1998, p.66) claims that an event product *"is the end result - the event, the tournament, exhibition, seminar or show. It also involves all the ancillary contributions like programmes, presentation, quality production and customer care"*. Such definitions might be comprehensive but they are also unlimited. Arguably, an event product comprises the following elements:

1. The magnetic core: or the focal activity, which dominates the event and attracts the majority of the potential customers. The event type will essentially define the nature of this core (e.g. If it is Aida Opera Performances, the core will be the performances). Some events may have more than a core (e.g. a local cultural festival may include a street parade, firework show and a musical show).
2. Secondary activities: are all the attractions added to the core activity to complete the event's final shape. For some attendees, the importance of the secondary activities may exceed this of the core activity, (e.g. in the Olympic Games, some attendees may be more interested in merchandizing). Secondary activities differ from an event to another and may include catering, merchandizing, auctions, etc.
3. Infrastructure: includes all the elements, which do not attract the potential customers, but are necessary to complete the customers' overall experience and prevent dissatisfaction (e.g. parking, staff, information desk, toilets).
4. The psyche: is all the invisible and intangible elements, such as the event's theme, style, image, history, service quality and general atmosphere; and the organization name, which all together give the event its distinct essence.

Combining the elements in different ways creates different products (i.e. different events) (American Sport Education Program 1996). If customers are in a restaurant the main dish will be the "magnetic core", side dishes will be the "secondary activities", spoons, forks, tables will be the "infrastructure", while the lights, the music, the atmosphere and the restaurant name will be the "psyche". However, it could be argued that forming the event product includes identifying the following aspects: activities, venue, theme and timing

3.4.1.1 Identifying the event activities

Despite the importance of the event activities, which can be described as the event magnetic core that holds the event meaning and supposedly presets the main attraction for attending the event, there are few references in literature to them. Special event activities split into core and secondary activities. Core activities are determined by the event nature (e.g. sport, art, culture), idea, theme, aims, and budget and may be supplemented by secondary activities (e.g. catering, merchandizing) to give the event its overall shape. Some events may have multi-core activities, e.g. a festival includes a street parade, a firework show and a concert. Catering, music, exhibits, dancing and sports are amongst the most frequent activities in special events (Getz and Frisby 1988).

3.4.1.2 Selecting location and venue

Arguably, an event location differs from an event venue. The term "location" can be utilized to describe a general place (e.g. a desert or an indoor location), whereas "venue" denotes a specific site (e.g. the Luxor Temple or the Royal Albert Hall). Choosing an event location and venue goes beyond just finding an arena that will hold the crowd (Catherwood and Van Kirk 1992). An appropriate choice is of key significance to the event's overall success (Getz 1997). Location and venue can help command prestige prices – a ticket for a front row seat at the pyramid-side Aida concert costs $800 compared to $120 for the same ticket at the Egyptian Opera House. Location and venue can also represent the main, a main, or at least an additional attraction for the special event (e.g. Jerash Songs Festival in the Jerash Roman Theatre, Jordan) (Goldblatt 2000). Selecting location should principally consider the event activities and theme. For example, selecting a wrong location (i.e. indoor club) for hosting a Hard Rock band associated with a pyrotechnics show led to 95 death in Rhode Island, USA, 2003 (BBC 2003). Additionally, the following factors should be considered when selecting the venue.

Venue size - should fit with the event potential demand and the areas required for the staff, performers, equipment, stores, administration, etc. A huge venue is not always the best choice, especially when *"they* [visitors] *are expecting or even desiring large crowds at an event"* (e.g. street festivals) (Wickham and Kersetter 2000, p.167) or when customers are hardly able to move (e.g. older people, children, or disabled).

Venue facilities - include items such as ticket booths, stages, toilets, information and communication technology connectivity, disabled facilities, power supply, audiovisual systems as well as catering and first aids.

Venue visibility, clustering and accessibility - visibility is vital for drawing the customers' attention, especially when financial constraints preclude large promotional campaigns. Clustering is *"the association of events with other attractions and services"* (Getz 1997, p.84) (e.g. a historical site, shopping centre) to jointly form a stronger package, even if there is no formal liaison between the event and the co-located attraction. Accessibility relates to the proximity of transportation means for the staff and potential customers, their cost, frequency and capacity; and the availability of parking areas.

Venue history and atmosphere - history can impact either positively or negatively on the venue reputation (Getz 1997). Tiananmen Square, Beijing, for example, has no history in hosting special events but its association with the bloody clashes between the Chinese students and police in 1989, led to stiff resistance to it hosting part of the Olympic Games 2008 (Washington Times 2001). Some other venues are not equipped for hosting events but have a strong appeal due to their distinctive history (e.g. the Pyramids). Finally, the venue's surroundings could also be vital, especially for mega events including the social circumstances (e.g. the crime rate), the economic state (e.g. the income average), the prevailing political situation (e.g. civic crisis), the weather conditions, especially for outdoor events, and environmental considerations (e.g. pollution rate).

Venue cost - is a key factor for most events, especially those with limited budgets. Cost should be considered in the light of the other factors. For instance, a well-equipped, visible venue with higher rent fee might be a better option compared to an unequipped, invisible less expensive venue.

Personal preference - however unscientific, the organizers' personal preference is a key factor influencing venue selection. Armstrong (2001, p.51) notes that some organizers are *"passionately in love with inappropriate venues or hate the ones that fit your event"*.

A map of the venue, list of facilities, frequent visits and conversations with the venue staff besides *"a step-by-step process that walks you through your event and allows you to see areas that could pose potential problems in advance"* (Allen 2000, p.11) should help the organizers to demonstrate how the event can fit into the venue.

Finally, *"where existing venues are not suited to events, new venues and facilities may need to be constructed"* (Carlsen *et al* 2000, p.253) (e.g. the Royal Welsh Show, Builth Wells; Llangollen International Musical Eisteddfod,). Yet, a key issue will be the use of the venue for the rest of the year; thus *"considerable marketing efforts need to be employed to attract events that will utilize purpose-built facilities"* (Carlsen *et al* 2000, p.253).

3.4.1.3 Theming

Arguably, theming means giving the event an identifiable concept or personality, which distinguishes it from the others, whether this concept is of a permanent or a temporary nature. A successful theme is one that enhances the event image, reflects the potential guests' needs, gives the event a unique personality, can easily be illustrated within the event availabilities (Goldblatt 1990) and doubtlessly, is complementary and synergistic to the event idea and aims. Themes can take numerous forms, but heritage themes dominate (Getz 1997). Whatever it is, *"once the theme is established, the elements of the event must be designed to fit in with the theme"* (McDonnell *et al* 1999, p.246) including items such as the event name, logo, venue décor, staff uniform, activities, music, special effects, catering and merchandize (i.e. the theme should be the umbrella to unify the event image).

3.4.1.4 Timing

Event timing does not mean just putting a circle around a day, but defining the year, the month, the day and even the hour (Watt 1998). If the event is the Olympic Games, for instance, defining time could make a difference of four years. On the other hand, defining the hour could be the gap between failure and success (e.g. Cairo International Film Festival 1997 opening ceremony was scheduled at 7.00 pm; half hour later there was a crucial football match. The festival organizers did not notice the overlap and thus unfortunately a small audience attended to salute the festival guests). Timing can be affected by different factors. First, the potential customers' features (e.g. if the target market is families with children then "school time" must be avoided) (Allen 2000). Second, the "competitive activities" which is broader than the "competitive events". The former includes anything that might attract the targeted customers away from the event, ranging from a World Cup final to an episode of a popular TV programme. It might be impossible to consider all of them but avoiding clashes with the major activities is preferable, as this *"can be disastrous for all involved"* (Watt 1998, p.6). Third, the external incentives or disincentives which may facilitate or prevent customers' attendance (e.g. weather; traffic); and finally, the organizers' preference. Event organizers will often come out with several positive (e.g. dates suggested by customers) and negative (e.g. unsuitable weather) dates. However, disregarding the unsuitable dates might be an initial step, before evaluating the appropriate dates for a final selection. Finally, the suggested date must allow enough time for planning.

Timing also comprises scheduling and programming. Scheduling could be described as a detailed temporal scenario for the event managerial procedures (Getz 1997). Hundreds of tiny details can be included (Allen 2000). So, a master schedule could include the major actions to facilitate each manager deriving a separate schedule for her/his area. Finally, event schedules are usually utilized to facilitate viewing, monitoring and evaluating the event managerial progress (Getz 1997).

Event programming is, arguably, a temporal plan for broadcasting the event activities. Three factors affect programming. First, scheduling is an administrative process, which does not consider the customers' opinion. As to programming, customer preference is essential. Second, activities are live shows where there is no opportunity to rectify faults; thus, it requires more accuracy. Some event organizers are so accurate that they use stopwatches to calculate the needed time. However, Goldblatt (1990, p.33) suggests, *"the largest planning block of time you should use is quarter-hours"*. Third, the programming should consider the event aims. For example, if the event aims to achieve financial profit, then money-generating activities should be scheduled in the peak times.

Finally, it should be noted, *"people buy benefits, not features"* (Briggs 1997, p.46). Such notion must be considered when designing the event product aiming to create a combination that meets the aims of the potential customers and the event organization. This approach to product design labelled "customer orientation", which is against "product orientation". Getz (1997, p.251) states *"many events suffer from a "product orientation" - that is, they try to sell their event with little or no regard for what potential customers need, want, and will pay for"*. Like most of the leisure products, special events are intangible, perishable, unique, and complementary and require simultaneous production and consumption, which influence how they should be marketed (Resnick 1991).

3.4.2 Financial Study

Financial study is an imperative procedure whenever planning special events, even in the case of not-for-profit events. Special events financial study focuses on: budgeting (section 3.4.2.1) and cash flow (section 3.4.2.2).

3.4.2.1 Budgeting

A budget is an imaginary description of the financial situation expressed in monetary terms (Salem 1998). Several reasons justify the importance of budgeting. First, budgeting helps estimate the potential income of the event, expenditure and financial profitability (Walsh-Heron and Stevens 1990). Second, budgeting is a key tool for the financial controlling of the event and evaluation system as it represents the criterion for monitoring the actual cash flow (Shone and Parry 2001). Third, budgeting is also the base on which other financial estimates, modifications and decisions can be built (e.g. pricing). Fourth, the budget sheet is an indispensable document when arranging for subsidy, sponsorship, insurance or liability (Youell 1994). Finally, given many special events are increasingly undertaken on commercial basis, financial profits seem to be a key issue when assessing the event failure or success. In this regard, Anthony and Young (1994) suggest three steps for budgeting: guideline estimates, estimates, and review and approval. These steps could be modified to be: first, identifying and estimating cost elements; second, identifying and estimating income sources and third, reviewing and decision-making.

Identifying and estimating the cost elements

Special event expenditure includes all the costs, which are expended upon a special event during its different phases starting from the initial search for an idea until the post-event evaluation. Consequently, a wide range of potential expenditure elements can be listed.

1. Pre-event administrative preparation: feasibility study, market research, contracts, administrative supplement, etc (Salem 1998).
2. Venue fee (Catherwood and Van Kirk 1992): free, free but taxes paid, flat fee, percentage of the ticket sales, or a percentage plus a flat fee, etc.
3. Venue preparation: equipment (e.g. sound and lighting system), decoration, security (e.g. gates, fire resistance), toilets, signs, etc.
4. Promotion (Catherwood and Van Kirk 1992): advertisements, flyers, banners, pamphlets, brochures, direct mail, public relations, personal selling, etc.
5. Staffing: salaries, rewards, catering, uniform, training, accommodation, transportation, free service, etc (Getz 1997).
6. Talent: the cost of obtaining the performers or the participants (Catherwood and Van Kirk 1992), including the same items listed in staffing.
7. Operational cost: electricity, gas, telephone, etc (Rehem and Mustafa 1981).
8. Special arrangements, disabled services, VIPs' services, etc.
9. Additional cost: such as VAT (Watt 1998) and insurance.
10. Contingencies: to cover any unforeseen cost. The contingencies can be calculated as a percentage of the whole event costs (e.g. 10%), or according to the expected risk (Armstrong 2001).

Identifying and estimating the income elements

Acquiring income resources is the most or the second most frequently mentioned problem when hosting events (Getz and Frisby 1988). This is mainly *"because festivals do not rely on one predictable source of funding,* [but on raising]...*small amounts from numerous sources that often change from year to year"* (Pyo 1995, p.150). However, income sources vary extensively from an event to another but generally include the following sources.

Donations, charities and patronages - which are afforded by devotees, philanthropists, public agencies, etc. without stipulating benefits in reward. Donations and suchlike are favoured funding sources as they place limited responsibility on the event organizers; but, obtaining donations has become more difficult as they *"have been cut drastically…and those…still available are increasingly coming with strict accountability criteria"* (Getz 1997, p.207). As well, donations depend on the givers' desire and emotional preference, which could be changeable and unpredictable by the event organizers. Additionally, some patrons prefer to remain anonymous (Waters 1994), which makes them unapproachable.

Sponsorship - historically, *"the Medici Family who ruled Florence from 1434 to 1637 undertook the first recorded sponsorship as it sponsored painters, artists, sculptors and scholars"* (MacDonnell *et al* 1999, p.146). Originally, sponsorship was regarded as a philanthropic act *"a step above charity"* (Catherwood and Van Kirk 1992, p.101). The appeal was based on the thought that the sponsors generated income from the community and were obligated to do something in return. Nowadays, neither the organizers nor the sponsors deal with sponsorship as philanthropy. In 1979, American corporations spent less than $9 million on sponsorship. Whereas in 1984, it was valued at $350 million (Hall 1992), then grew to $3.2 billion in 1992 and to $4.2 billions in 1994; whereas in the same year, the monetary value of worldwide sponsorship exceeded $10 billion (International Event Group 1995). These figures point to special events sponsorship as *"one of the most rapidly growing sectors of marketing"* (Meenaghan 1999 cited Brown 2002, p.187).

This growth explains why Head (1981, p.2) uses the term *"modern sponsorship"* to describe *"a mutually beneficial business arrangement between sponsor and sponsored to achieve defined objectives"*. Following Head, most of the succeeding definitions adopt the same approach. *"A reciprocal relationship that involves an organization and a* *business engaging in an exchange which offers commensurate benefits to each entity"* (Crompton 1994, p.65). *"A cash and/or in-kind fee paid to a property in return for access to the exploitable commercial potential associated with that property"* (International Event Group 1995, p.1); besides others (e.g. Brooks 1994; Getz 1997; MacDonnell *et al* 1999). Thus, two basics can be derived: first, sponsorship is a mutual relationship where some benefits must be paid for the sponsors in return otherwise it is a charity; second, the sponsors' contribution can take the form of cash, in-kind goods or service. Consequently, sponsorship can be defined as:

> *A reciprocal benefits agreement between an event and a funding body, in which the later obligates to offer guaranteed cash, in-kind goods, and/or services, in return for a promise from the former to deliver certain arrangements, according to defined, accepted conditions.*

In this regard, it is arguably vital to differentiate between "potential benefits" and "offered arrangements". From the sponsors' viewpoint, sponsorship is a tool to fulfil certain aims (e.g. enhance the sponsor's image). These aims are the sponsor's "potential benefits" and they are not promised by the event. What is promised is a set of "offered arrangements", such as putting the sponsor's name on the event promotional materials, discounted sites for adverts, free tickets, hospitality tents, a copy of the market research. So, the formula is: in return to the sponsor's fund, the event promises to offer certain arrangements (A,B,C), which are thought to help the sponsor fulfil the potential benefits (X,Y,Z).

Regarding the top 200 UK sponsors, the principal benefit sought by the sponsors was to access specific target audience (Sunshine *et al* 1995); or in other words, "*to directly communicate with potential customers"* (Appleby 1999, p.68), (e.g. Cadillac, as a high-priced car, sponsored the Scramble Golf Series aiming to approach 15,000 golfers and their families). Several researchers (e.g. New Zealand Marketing Magazine 1991; Hall 1992; Waters 1994; Crompton 1994; Pyo 1995; Geldard and Sinclair 1996; Getz 1997; Brown 2002) report other benefits, such as image enhancement (e.g. Colgate

Palmolive sponsored the 1992 Winter Olympic games), creating a more contemporary image (Grundig Electronics sponsored a series of football competitions), testing new products (e.g. during the Chili Cookoff Festival, Pillsbury used 20,000 attendees to test new products), promoting products (e.g. McDonald's sponsorship policy refers to events as a promotional tool), or penetrating a target market (e.g. Fuji Film sponsored the 1984 Los Angeles Olympic Games aiming to face Kodak inside the United States).

On the other hand, the main benefit for the event is obtaining funding, which can take the form of monetary supply, in-kind contribution (e.g. equipment) and service (e.g. staff training, consultations) (Watt 1998). Other potential benefits include utilizing the sponsors' names for attracting more attendees and media coverage (e.g. the Sunkist Fiesta Bowl in Arizona) (Hall 1992), utilizing the sponsors' adverts for promoting the event, enhancing the event image (Getz 1997) and finally sponsors can guarantee the cash flow stability.

Identifying potential sponsors requires an efficient database of the potential sponsors' aims, promotional strategies, target market and sponsoring history before rejecting those who are unsuitable or unlikely to be interested (Geldard and Sinclair 1996). Establishing such a database could be inapplicable for all but huge event organizations, due to the massive time, money and effort required. This may justify why some event organizers adopt a random approach for contacting sponsors. Identifying the potential sponsors should not rely only on their potential willingness but also on their suitability for the event itself (Geldard and Sinclair 1996); nevertheless, not all the events have the luxury of shortlisting the potential sponsors. Some events may accept what is available.

Finally, sponsorship is likely to be the duty of the marketing department but it usually needs co-ordination with the financial department.

Subsidy - may take the form of governmental monetary fund, in-kind goods, free service, tax exemption or *"guarantee against loss"* (Waters 1994, p.46). Before the 1984 Los Angeles Olympic Games and due to the non-commercial nature of most of the mega events (e.g. Moscow Olympic Games), governmental bodies were willing to subsidy special events aiming to achieve social, political or economical benefits for the community. Currently, governmental subsidy fades, especially in its monetary form (Waters 1994).

Fund-raising - means producing smaller activities to generate revenue (e.g. raffles, auctions) (Getz 1997). Fund-raising is mid-way between donation and revenue. It is not a donation as the contributor could take something in return (e.g. a souvenir). It is not also sales revenue, as the contributor knows that s/he might get nothing (e.g. raffles) or the reward might not worth what s/he pays and s/he is willing to do. Fund-raising could also be used as an additional attraction for enriching the event program. Finally, some events can be - *per se* - a fund-raising activity for another purpose (Getz 1997).

Admission fee - is the money paid by the attendee to enter the event arena. The fee may include nothing but entering the site (e.g. Abu Simple Festival), in-site or out-site service (e.g. parking). Admission fee may take the form of a single entry (e.g. Tut 75th Anniversary) or a multi-entry admission (e.g. Llangollen International Musical Eisteddfod), which is more likely in case of multi-days events. The fee could be a unified admission fee, different fees based on age, time, group, etc (Getz 1997). Finally, admission pricing is a joint area between the event financial and the marketing committees (see: pricing, section 3.4.5.4).

Broadcasting rights - due to the phenomenal growth of media, broadcasting rights (e.g. live broadcasting, sales of recorded tapes) have become a key income source for some events (Allen *et al* 2002). Certainly, not every event is able to attract media coverage. Sometimes the event name is enough to attract media (e.g. Football World Cup); other events may accept a reciprocal benefits agreement (e.g. free media adverts for free media exposure). However, the deal value varies due mainly to the event history and type and number of potential viewers. Finally, event organizers must be ready to deal with the Internet broadcasting as a growing trend (McDonnell *et al* 1999).

Catering - can just be an income source (e.g. sport events) as *"profits come mainly from ancillary services"* (Waters 1994, p.50), or an event gimmick (e.g. Taste Of Chicago) where it simultaneously acts as an attraction and income source. Catering can generate income by selling food and beverage in booths managed directly by the event organization (e.g. Mayfair Festival, the Museum of Welsh Life) (Quigley 1996), or through permitting others to sell food and beverage inside the event venue (e.g. Urdd Eisteddfod).

Merchandizing - is a lucrative income source as *"events are naturally merchandizing marts, and many events have retailing as their primary purpose"* (Getz 1997, p.207). If the event has a significant position or history (e.g. hallmark, mega event), it can then establish its brand-name merchandizing line (e.g. souvenirs). Merchandizing has developed rapidly; it *"was in its infancy in 1984 during the Los Angeles Olympic Games, but for the 1996 Atlanta Games* [was] *expected to generate $ 1 billion in licensed sales*" (Roach 1995, p.42). Events can also permit others (e.g. vendors) to sell different products in the event site (e.g. local products). Besides being an income source, merchandizing can also help enrich the event activities and act as a promotional tool for attracting more customers (see: promotion, section 3.4.5.4). Finally, organizers should be reasonable that they *"cannot assume that everything with the event logo or design on it will sell"* (Getz 1997, p.207).

In-site performances - some events permit the attendees to enter for free into areas where some activities take place (e.g. merchandizes tents, amateur shows) and embrace programs (e.g. professional shows) where attendees should pay (e.g. Sao Paolo Festival).

Advertisements - appear inside the event venue, on the event publications (e.g. tickets, pamphlets), etc. is another income source for the special event; but it should be clear that advertising here does not contain the sponsors' free advertisements.

Back-end income – results from *"sales, which are generated by the promoter/manager after the event is over"* (Catherwood and Van Kirk 1992, p.136). For example, event organizers can use the attendees' data (e.g. e-mail; address) to sell them other products after the event; or sell the attendees' data to other corporations. Ethically, the attendees should be informed in advance, with a confirmation of omitting the data of those who refuse. Selling the superfluous equipment and the recyclable refuse is another back-end income.

Other sources - include parking fees, tours for VIPs and participants. However, *"private shareholders"* (Walsh-Heron and Stevens 1990, p.118) are less common and sometimes completely ignored.

Two approaches can be used for forecasting the budget: *"zero-based budgeting...and an incremental budgeting"* (Getz 1997, p.232). The incremental style relies on the historical data gained from the previous experience, whilst the zero-based style depends on collecting new data every time aiming to gain accurate and credible figures. Finally, there are no limits for the event budget. Some events cost and achieve several billions (e.g. mega events) while others may exist with few thousands (e.g. local events).

Review and decision-making

After estimating the event income and expenditure, a draft budget summarizing the potential financial situation in a tidy and usable frame can be concluded to enable the event organizers: first, ensuring that all the potential income and expenditure elements have been identified; second, reviewing the estimates; third, exploring the possibility of reducing the cost and increasing the income (Salem 1998). The event organizers can then use the draft budget to define if the potential financial situation is satisfactory. If it is satisfactory, it will then be the event budget. If not, financial modifications can be suggested (e.g. changing prices) and the budgeting process should be repeated again. Otherwise, the event may be rejected due to financial invalidity. Faults during budgeting are usually destructive, as they would mislead all the following financial estimates and decisions. Several times budgetary faults led events toward failure where some events were abandoned temporarily (e.g. Aida Opera Performances, Pyramids 2000) or discarded completely (e.g. Pyramids Tennis Championship, Egypt). Finally, widespread participation of senior staff in budgeting is recommended in order to attain corporate understanding of implications and impacts of the work of various sections (Walsh-Heron and Stevens 1990).

3.4.2.2 Cash flow

Overall financial profit should not be sufficient for the event organizers to declare the event financial efficiency; but income and expenditure should also be accurately scheduled to ensure appropriate cash flow. Cash flow is *"a cost/revenue timetable, which forecasts the calendar of the monetary liquidity in and out flow"* (Salem 1998, p.205). Consequently, event organizers should investigate the precise time of both paying each cost item and receiving each income. Of course, the later cash is paid out and the earlier income is received, the safer the event's financial situation. For designing a cash flow chart, *"at budget time, all managers must be required to identify not only anticipated costs and revenues, but to schedule them as accurately as* *possible"* (Getz 1997, p.233). However, two problems usually exist. First, whereas most costs can easily be defined regarding when and how much, income can hardly be defined concerning time or volume. Second, most costs are incurred pre-event (e.g. salaries, market research, promotion) while most revenues are generated during the event (e.g. merchandizing, catering, tickets). Negotiating delayed payment to suppliers (e.g. cheques on the day after the event) and getting some revenue sources, especially sponsorship and grants, if any, 'up front' can be a solution. Failure in fulfilling the monetary obligations does not only mean that the event is ruined but the organizing body's reputation as well. *"When this liquidity is gone your reputation may not be far behind"* (Goldblatt 1997, p.113).

3.4.3 Setting up the event logistical plan

Although the term "logistics" is originally a military term, it is widely used in both the theoretical (e.g. Armstrong 2001; Shone and Parry 2001) and practical context of event management. *"Event logistics includes the efficient supply of the customers to the product, and the supply of facilities to and from the event site"* (McDonnell *et al* 1999, p.210). Consequently, events logistics can be classified into three areas: the customer flow towards the event, the facilities flow towards the venue, and the shutdown plan.

3.4.3.1 Customer flow towards the event

A number of actions must be accomplished to facilitate the customers' flow toward the event, which arguably are: signs and mapping; transportation and parking; crowd control and risk management.

Signage and mapping - providing customers with an efficient system of signage and mapping is something beyond just erecting signs inside and around the venue. Signage and mapping have a joint relationship with other planning areas, such as marketing, crowd control and risk management, where signage can serve to attract, warn (e.g. slippery surface), instruct (e.g. no smoking), inform (e.g. exits) and direct the crowd (e.g. box office 50 m) (Abbott and Geddie 2000). Defining the spots where signs should be fastened is another joint area mainly with transportation and parking to consider where potential customers are likely to come from. Another key topic is the signage language, especially for international events. The national language plus the English language - if not the national language - is common, but other languages might be required as well. For example, 64 % of the attendees of Abu Simple Festival (Egypt) between 1986 and 2002 were French (Ministry of Tourism 2003). Finally, issues such as the signs' colour and writing style could help enhance the event theme.

Transportation and parking - a transportation and parking plan can be set, considering the means of transportation which customers are likely to use, optimal stopping-places, the available car parks and their capacity compared to the needs of the customers, staff, performers and suppliers. Another option, in case of a shortage of car parking, is using shuttle buses from designated gathering points. The availability of transportation and parking often has a major influence on the customers' attendance. Transportation and parking have a joint relationship with areas like venue selection (McDonnell *et al* 1999), signage and mapping. Finally, transportation and parking can be utilized to provide unexpected services to enhance the attendees' overall experience. In this regard, Goldblatt (1990, p.136) records:

> *After guests had released their vehicles to the valet attendants and gone into dinner, the valets were instructed to wash each windshield. The valets then placed a small preprinted note under each windshield wiper. As departing guests entered their vehicle; the valet handed them the note, which read, "We've washed your windshield to give you an even better view of our special event. Please come back soon.*

Crowd management, crowd control and risk management - Crowd management is built upon the thought that *"there is an assumed negative relationship between increasing visitors density and visitor satisfaction"* (Manning and Lime 1996 cited Wickham and Kerstetter 2000, p.168). Crowd management *"includes the facilitation,* *employment, and movement of crowds"* (Abbott and Geddie 2000, p.259) aiming to distribute the crowd as evenly as possible, prevent congestion and minimise queuing (McDonnell *et al* 1999) to get what Eroglu and Harrel (1986 cited Wickham and Kerstetter 2000, p.169) call *"functional density*...or *crowding that adds to a visitor's experience". "A crowd management plan involves considerations of a number of key matters, specially reviewing: the potential crowd's sociological behaviour; seating arrangements; transportation; time; parking; weather conditions, demographics; size; box office; and concession stands"* (Berlonghi, 1994 cited Abbott and Geddie 2000, p.260). Customers may confront queues for admissions, parking, entering, etc (McDonnell *et al* 1999). Thus, queuing may form a key part of the customer's overall experience (Getz 1997). Staff can play a dual role: to handle problems (e.g. jumping-up) and amuse the attendees (e.g. distribute gifts). Crowd management deals also with the crowd distribution, which can be efficiently achieved by allocating the event activities in different spots inside the venue (Abbott and Geddie 2000).

Crowd control *"comprises steps taken once a crowd (or sections of it) has begun to behave in a disorderly or dangerous manner"* (Abbott and Geddie 2000, p.259). It involves constraining and directing a disorderly crowd (e.g. riots, fighting due to hooliganism or confusion following a threat) and is normally the job of professional security. The activities and customers' features can help define the nature of potential risk. *"The promoter who brings the Bolshoi ballet...understands that mobbing the stage, screaming and yelling will not be part of his crowd's psyche"* (Catherwood and Van Kirk 1992, p.81); while, football or rugby matches, for instance, can be trouble magnets due to hooliganism or drunkenness.

Risk management aims *"to identify potential risk and taking steps to reduce or militate against them"* (Shone and Parry 2001, p.201). A risk may be as destructive as a fire or as harmless as an irritating whistling microphone. Hazards are classified into: *"first, risk* *exposure such as injury or death to employees, volunteers, visiting dignitaries, and participants. Second, risk on property. Third, there is an exposure to risks in relation to the public that come to visit and spectate at events"* (Chang and Singh 1990 cited Hall 1992, p.112). These can, arguably, be modified to be threats against: individuals, properties and event activities.

According to *the event safety guide* (Anon 2004a), threats against individuals include hazards, which threaten staff, volunteers, performers and attendees before, during and occasionally for a limited time after the event. Threats against individuals range widely from slipping on the floor to a terrorist attack and there is a wide range of possibilities between such extremes. These threats can be due to human danger (e.g. fights, stampedes) or inhuman causes (e.g. electric shocks, fires). Human danger can be eliminated by conducting a tight crowd management and control plan; whilst, inhuman threats can be minimized by rigid application of the safety terms (e.g. emergency exits, warning signs). Threats against event properties include accidental hazards (e.g. fires) and deliberate hazards (e.g. thefts). Using an efficient security system, reviewing and applying the safety codes of the selected venue can efficiently treat such threats. Threats against the event activities include any contingency, which may cause delay, postponement, cancellation or at least an unpleasant atmosphere. The list includes things like power failure, the absence of a key person or bad weather. Such threats are the most difficult to deal with as most of them are out of the organizers' control. In order to minimize these possible threats, the organizers should ask "what if..." and then design a plan "B" to conduct the event within these possible threats.

Clustering these three areas should end with a risk management plan. Berlonghi, author of *the special event risk management manual* (1994 cited Getz 1997) suggests a six-step plan, which could arguably be modified to a four-step plan: first, identifying the threats; *"risks can generally be identified through analysis and common sense"*

(Getz 1997, p.241); second, establishing a list of precautions for eliminating these threats; third, establishing a list of actions for handling each threat if it occurs, and finally, developing a detailed plan, which explains who will execute the actions. Regardless the type or volume of risk, if it is not well managed, it may destroy the event. It worth reading what Captain E.J. Smith, who was the captain of the SS Titanic on its catastrophic voyage from Liverpool to New York, wrote in his diary:

> *When anyone asks me how I describe my experience of nearly forty years at sea, I merely say uneventful. Of course, there have been winter gales and storms and fog and the like, but in all my experience, I have never been in an accident in any sort worth speaking about. I have seen but one vessel in distress in all my years at sea. I never saw a wreck and have never been wrecked nor was I ever in any predicament that threatened to end in disaster of any sort.*
>
> (Anon 2004b)

Similarly, special events organizers may spend all their professional lives without facing a real threat, but when it happens it might be a disaster.

3.4.3.2 Facilities supply toward the venue

Putting the site in the required order often necessitates supplying the venue with several facilities. Frequently, the event venue will offer some of the infrastructure required for the event (e.g. electricity, toilets, audiovisual system), but other facilities may be additionally required. For instance, an *"outdoor festival will need the sourcing of almost all the facilities"* (McDonnell *et al* 1999, p.219). The facilities list may include tens or even hundreds of items, such as sound and lighting systems, staging equipment, caravans, administrational, and decoration facilities. For securing efficient and smooth flow of facilities, special event organizers should precisely define the required facilities (i.e. regarding type, number and quality) relying on a robust review of the venue facilities, then to have plain contracts with suppliers to provide these facilities according to an accurate timetable.

3.4.3.3 Shutdown plan

Shutdown activities are an essential part of the events management; but apparently few studies discuss them. The purpose of the shutdown plan is to ensure that everything is put back in place after the event (Armstrong 2001). In more detail, the shutdown plan should, arguably, include two tasks: dismantling and removing the equipment, and cleaning up. The equipment could be hired or owned by the venue or the event organization. Thus, it should be clearly notified in the contracts, who is responsible for dismantling and removing the equipment (i.e. the suppliers, the venue or the event organization). Cleaning up is another task, which ideally should not be confined to the venue, but should include cleaning the surrounding area, which has been used by the event attendees as well; that is beside removing the promotional banners, posters and suchlike. Of course, the volume of the shutdown activities will vary depending basically on the event volume. *"The manager of a small event may only have to sweep the floor and turn off the lights. Most difficulties arise in inaugural events, large events and multivenued events"* (McDonnell *et al* 1999, p.229). Finally, shutdown activities can help generate additional back-end income through the selling of any superfluous equipment and the recyclable refuse.

3.4.4 Human resources management (HRM)

Similar to other services (e.g. tourism, leisure), the effective planning and management of human resources are at the core of any successful event (Allen *et al* 2002) as it contributes strongly to customer satisfaction (Salem *et al* 2004). Special events' HRM is arguably more complex than for other services. First, while paid staff represent the focal part in most of the other services' workforce, volunteers represent a significant part of the events' workforce (e.g. 9100 volunteers in the 1994 Lillehammer Olympic Winter Games) (Elstad 1996). Second, *"service is a performance rather than an object. Performance requires people interacting with people; so employees are...the essence of the product"* (Lovelock 1983 cited McCleary 1995, p.2). Thus, staff are not just employees who tender services but also part of the event overall experience. Third, events are live shows where staff faults can hardly be covered. Finally, while working for a better position is an essential motive for employees (Maund 2001), a significant part of the special events' organizations is "one-off", where chances for permanent jobs or career development are limited, consequently a vital motive for staff competence fades. However, the special event HRM includes staff structuring and forming the event staff.

3.4.4.1 Staff structuring

Despite both the undoubted importance of the human resource contribution to the success of service projects in particular and the extensive literature on the HRM in relation to special event management, special event literature pays little attention to the discussion of staff structuring.

Staffing structures vary considerably from one event organization to another, but general guidelines are common (Torkildsen 2001). Critten (1994) claims a leisure firm may consist of a small core of full-time employees supplemented part-time staff. Arguably, such a structure may fit a traditional permanent firm, but for a special event organization, these structures should be adapted to fit the event frequency (i.e. one-off or a permanent event). For a temporary organization, a staff structure will arguably include three levels (figure 3.3):

1. A temporary core: comprises the event Management Board and consultants.
2. Temporary paid staff: usually for positions like financial control and marketing.
3. Volunteers: *"a volunteer is one who enlists or offers their services to the organization of their own free will, and without expecting remuneration"* (Getz 1997, p.198); and they can almost work in all event positions.

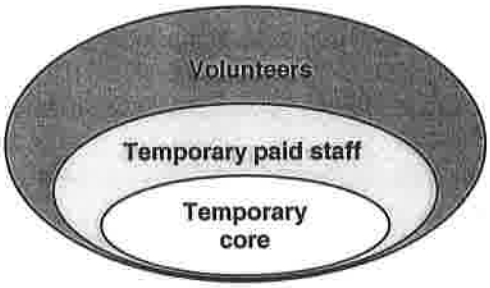

Figure 3.3: Staff chart for a one-off event organization.

For a permanent organization a four-level structure can be suggested (figure 3.4):

1. A permanent core: comprising the Management Board.
2. Professional temporary consultants: include experts who are required temporally for a particular purpose around the event period.
3. Paid staff: include permanent staff to carry out the organization annual duties and temporary staff to work for a particular time around the event.
4. Volunteers: who can work in almost all the event positions.

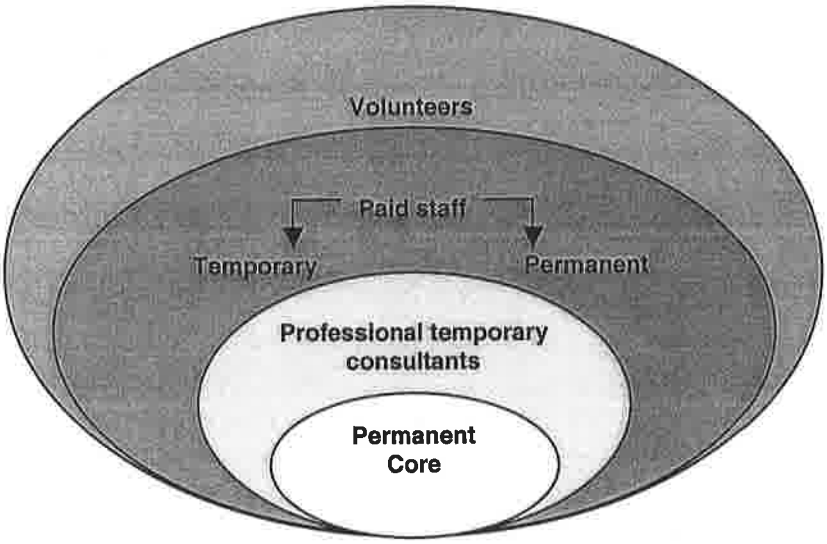

Figure 3.4: Staff chart for a permanent event organization.

3.4.4.2 Forming the event staff

Forming the event staff can go through a three-step process: job description, estimating the staff number and staff recruitment.

Job description

Job description can be broken down into six areas:

Job Title - *"reflect...position in the organization...and functional areas"* (Getz 1997, p.187), and is an important tool for coordinating the event staff.

Duties - include *"most frequent...and...occasional duties"* (Torrington and Hall 1995, p.215), where permanent and temporary tasks can be defined for each position.

Line of management - *"this defines who the person reports to, and who reports to the person"* (Getz 1997, p.187). A clear line of management is particularly important with volunteers unaccustomed to organizational working.

Working conditions – including the location (e.g. office, open air site), work hours (e.g. fixed or changed), remuneration details (e.g. weekly, non-paid) and any special conditions.

Performance standard - addresses the anticipated qualitative and quantitative contribution, against which the staff members will be evaluated.

Recruitment criteria - i.e. the type and level of knowledge, experience, skills and personal features required for performing each job satisfactorily.

Estimating the number of staff required

Estimating the number of staff required for an event is a complex process, which is arguably affected by elements such as the labour's cost, productivity and turnover, especially amongst volunteers, the event activities, objectives and financial situation, and the potential demand. A major related issue is the volunteers' utilisation, as no precise tool is available for forecasting their potential productivity, so overestimating the number of the volunteers required could be a solution (Salem *et al* 2004).

Two techniques can be used for forecasting the labour demand. First, the managerial judgement, which is the most common method of estimating staffing; and it depends on each manager's experience to estimate the number required for her/his area before the

HR manager amalgamates all the estimates in an overall HR plan (Clark 1992). Second, the work-study model, which can be used "*where it is possible to express work in terms of units and standard times,* [and]*...if the average productivity...is known*" (Pratt and Bennett 1990, p.111). This method is more scientific and goes through three steps: breaking the program into tasks (e.g. securing entrances); defining the number of staff required to complete each task then merging all the estimates in an overall HR plan (Getz 1997). For example:

The task:	guarding the event gates	
	Number of participants expected	25 000
	Number of arrivals in peak hour period	10 000
	Number through one gate per hour	2 000
	Number of gates required	5
	Number of turnstile operators required	5
	Number of shifts	1
	Suggested staff members per gate	2
	Total staff members for the task	10

Staff recruitment and selection

Staff recruitment and selection can be broken down into seven steps:

Attracting candidates – press adverts and job centres are the most utilized methods for attracting candidates (Torrington and Hall 1995). These sources could be effective for attracting permanent staff; but regarding volunteers, sources such as previous volunteers, sponsoring bodies, special interests groups, social and sport clubs can be effective.

Applying - the used method (e.g. ads) usually explains when, where and how to apply for the job, where applications are widely used (Attwood and Dimmock 1985).

Shortlisting - aims to reject the unsuitable candidates (Torrington and Hall 1995). Rejecting volunteers may be viewed negatively. So, sending thanking letters or discount offers can help keep a healthy relationship with them.

Interview - was used *"by more than 90% of U.K organizations in 1994"* (HRM Guide 1995, p.66). It aims to discover the candidates' suitability (Pratt and Bennett 1990) and to ensure that the volunteers' motive to participate will not fade with time.

Selection - should be carried out according to a criterion, which specifies the candidates' ideal features, (Torrington and Hall 1995).

Contract - Since November 1993 the Trade Union Reform and Employment Rights Act has defined the information, which should be mentioned in an employment contract (e.g. names; date; rate and intervals of pay; hours of work; place of work).

Orientation - aims to provide new recruits with information about the event, the staff and the recruit's specific area (Getz 1997). In terms of special events, orientation has its own features. First, in other works, the new staff can examine the atmosphere of the real work, which is inapplicable in special events. Second, the orientation ends when the supervisors see that the new employee has fitted with the job (Plumbley 1985). In special events, supervisors can hardly assess the staff suitability until they are in the actual work - the event - where there is no chance for re-orienting unsuitable members. Third, there is a limit to the amount of information, which an employee can assimilate (Plumbley 1985); thus, the event may end before staff members are fully oriented with the work. Thus, orientation in relation to special events may need advanced training tools, such as recorded videotapes of previous events, visiting other events or lectures accompanied by slides or photos.

3.4.5 Marketing of special events

Marketing is an activity, which everyone practises almost everyday (Kotler and Armstrong 1999). In the context of special events management, Hall (1992, p.136) identifies three activities of special event marketing: *"read their needs and motivations, develop products that meet these needs, and build a communication programme which expresses the event's purpose and objectives"*. However, these three activities could arguably be modified into four activities, which jointly form the structure of the special event marketing (figure 3.5). These four activities are: conducting market research, identifying the target market (i.e. segments), forming the product (i.e. special event) and conducting marketing activities (i.e. promotion, pricing and distribution).

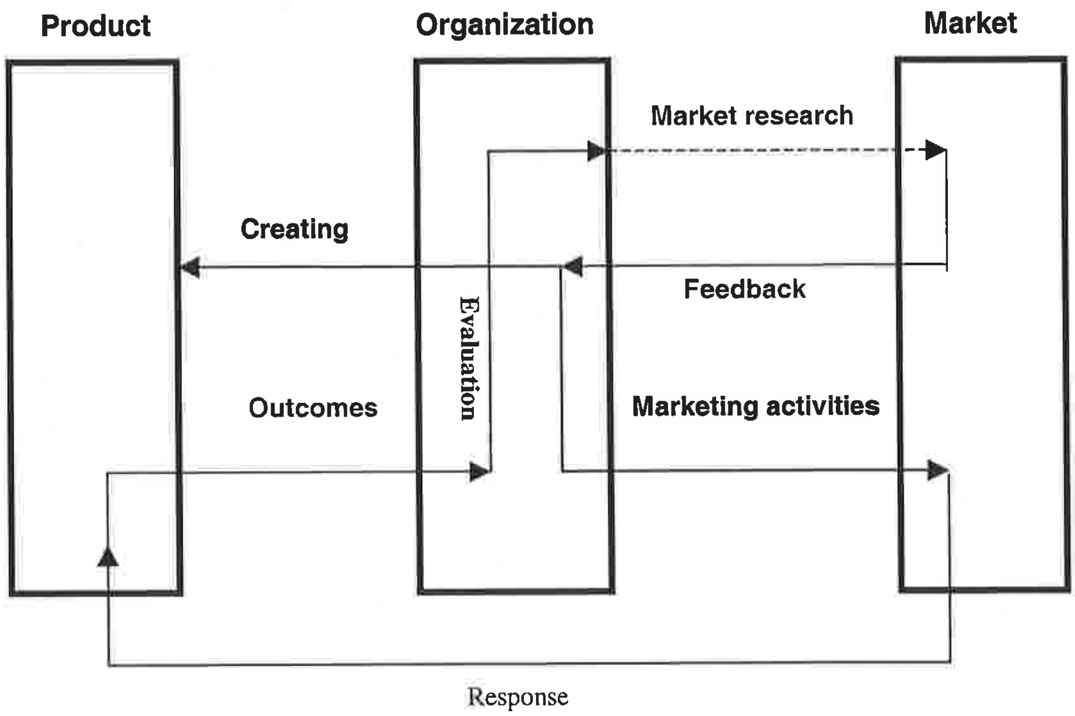

Figure 3.5: Relations between the four elements for establishing special event marketing.
---- Starting point

In the respect of the above figure, the special event marketing procedures can arguably be seen within the following flow:

1. The initial step comes from the event organization, which identifies a target market to contact via market research aiming to understand its features.
2. Feedback would be expected to flow from the market toward the event organization, covering areas such as identifying the features of the target market.
3. Based on the feedback, the event organization can create the product and can set the marketing activities (i.e. promotion, pricing and distribution) that fit the target market's features.

4. As a result of the marketing activities, the response of the target market could be either positive (attending the event) or negative (neglecting the event).
5. This reaction will be evidentially embodied in the event final outcomes (e.g. number of attendees, revenues, enhanced image).
6. Evaluating the outcomes will then be the initial step for the new cycle.

3.4.5.1 Identifying the target market

Market targeting could be defined as the process of *"evaluating each market segment's attractiveness and selecting one or more of the market segments to enter"* (Kotler and Armstrong 1999, p.196); whereas a target market for a special event is *"the people who would be coming to a particular event"* (Shone and Parry 2001, p.172). The special events' market targeting is based on the claim that *"most events do not appeal to everybody"* (Allen *et al* 2002, p.171). Thus, the event organizers should identify to whom the event might appeal (i.e. to identify the segments that are likely to be interested in the event).

Segmentation commonly occurs by geography or demography (McDonnell *et al* 1999). Geographic segmentation is *"concerned with the place of residence of event visitors"* (McDonnell *et al* 1999, p.117). For example, the event organizers could focus on the local residents (e.g. Mayfair Festival, Museum of Welsh Life) or the international tourists (e.g. Aida Opera Performances, Egypt). However, the more important the event, the larger its geographical catchment, which *"might be a quite small: people from the village and mainly those within walking distance. But for a larger event, a typical travel time of one hour might be seen...reasonable"* (Shone and Parry 2001, p.173). These limits in terms of distance or time are what will determine the outer limit of the catchment area for the event. The event organizers could then calculate the size of the target market in the terms of the population (Shone and Parry 2001). On the other hand, demographic segmentation *"concerns the measurable characteristics of* *people such as, age, gender, occupation, income, education and cultural group"* (Bowdin *et al* 1999, p.125). For instance, the event may focus on the youth (e.g. hard rock festival) or on the male sector (e.g. rugby match). Data derived from the local, regional and international entities may help identify these segments.

Selecting a particular market depends on its compatibility with the generic initial features of the event. There could also be group of main markets, or a main market (e.g. the local community) and group of secondary markets (e.g. regional and international tourists); and of course, the larger the event, the more likely to attract a diverse range of markets (Swarbrooke 1995 cited Shone and Parry 2001). However, identifying the target market is an initial step. The actual aim here is to understand the features of the target market(s) aiming to form the ultimate product and the marketing activities (e.g. price), which match these features. Understanding such features could be fulfilled via market research.

Finally, it might be proper to refer to the fact that there is no specific time sequence for identifying the event target market, the market research and the event product. If the event organizers are applying a customer-oriented approach, where the event is designed according to the customers' needs (Getz 1997), identifying the target market should then precede product creation; while if the event organizers are applying a product-oriented approach, where the organizers try to sell their event with little or no regard for the customers need (Getz 1997), then obviously forming the product will precede identifying the target market, which is widely applied (Getz 1997). On the other hand, the target market could be identified first, before researching that target market to identify its features. In addition, the market research could be done first, where one of the expected conclusions could then be to identify the target market.

3.4.5.2 Conducting market research

The issue of conducting market research has been identified, in relation to the special event decision phase (see section 3.3.6.1), and is investigated in more detail in chapter seven (see section 7.2.5).

3.4.5.3 Forming the product

The issue of forming the event product has been identified preciously in relation to the event product definition (see section 3.4.1).

3.4.5.4 Conducting marketing activities

The marketing activities comprise three activates which are: identifying the distribution channels for tickets, promotional activities and pricing.

Identifying the distribution channels for tickets

For establishing a distribution plan, three questions must be answered: who will distribute the tickets, where and when. Regarding who, there are three alternatives, direct channels (i.e. the event organization), indirect channels (e.g. ticket agencies, mega stores) or both (McDonnell *et al* 1999). Each alternative has its advantages and drawbacks. For example, indirect channels can stretch the distribution network and provide experienced system for ticket sales; while the main disadvantage could be increasing the ticket price. The organization capabilities, the targeted market scale (e.g. local, national, international) and the cost are the key factors when selecting between the alternatives.

Answering the question "where" aims to define the distribution points, which facilitate purchasing tickets for the potential customers. However, the market research and the previous experience could help identify the ideal distribution points relying on the potential customers' features (McDonnell *et al* 1999). A related issue here is planning the system of handling tickets to the distribution points and receiving back the unsold ones, and the ticket cash. Deciding when tickets will be released is usually related to the promotional plan. Distributing tickets may rarely precede launching the promotional plan, the opposite is possible, but parallel launching is the most applied scheme.

Finally, the global trends toward electronic trade (i.e. Internet trade) have already changed a lot of the traditional distribution concepts, especially regarding leisure activities whose one essential feature is its intangibility. Thus, whether the customer goes to the ticket agency or not, s/he will never visualize the bought product (i.e. the event) in advance, which facilitates distributing tickets through the Internet.

Pricing

In special events as elsewhere, pricing is one of the most complex as well as the most important aspects with which marketing teams deal. Ticket pricing has major implications for customer decision-making (Weaver and Oppermann 2000), thus it usually requires collaboration between the financial and marketing managers. Ticket pricing may cover entry only or may include in-site services as well (e.g. parking and transportation).

Backward pricing intends to set a price, which is believed to be effective for achieving the event aims, regardless of any influencing factors such as cost or competition (Getz 1997). The backward pricing technique cannot be used unless sufficient funds are available to cover any losses; and is usually applied in case of events, which focus on achieving social, cultural or political goals. The key factor here will be the customer's propensity to pay.

If backward pricing is not used then there are three stages for setting a price: costing; selecting a pricing strategy; determining a pricing structure. The first stage is costing, which provides a basis for a pricing decision and it requires considering the event total cost (see section 3.4.2.1). Costing must be coupled with estimates of likely minimum number of customers to determine a proper price for tickets to break-even, i.e. to cover event costs without profit.

Secondly, selecting a pricing strategy involves four considerations: the event objectives, i.e. whether the event is not-for-profit or for-profit – *"if the event is a commercial venture, the goal is probably to generate the greatest potential net profit"* (Goldblatt 1997, p.232); competition – few events have no competition and whilst some events *"apparently have no price-resistance...most others do have a point where price turns the crowd away"* (Catherwood and Van Kirk 1992, p.136); customer's characteristics and propensity to pay, which can be determined by market research; and product characteristics, e.g. quality, image and history. There are a plethora of different pricing strategies. However, those suitable for special events include:

- Cost-oriented pricing which bases *"pricing structures on the actual cost of providing the goods or services"* (Weaver and Oppermann 2000, p.232). This strategy is preferable if the event aims to achieve a full-cost recovery or a full cost recovery with a margin for profit (Getz 1997). However, most mega-events cannot hope to directly recover all their costs from admissions, given the enormous capital investment and will probably set a revenue target if adapting a cost-oriented pricing.
- Competition-oriented pricing - *"the emphasis here is on competitor behaviour as the major criterion for setting prices"* (Weaver and Oppermann 2000, p.231). The risk is that whilst prices are similar, costs, objectives, quality and customers may vary. The advantage is that the price will always compare favourably and is good for new events competing with mature events.
- Prestige pricing - *"the price is deliberately set higher than the competition for positioning reasons - usually to suggest quality and attract higher-spending*

visitors" (Getz 1997, p.215), although this may be a difficult message to deliver. Events *"with guaranteed high demand, can sometimes get away with charging high prices"* (Getz, 1997, p.216) and maximising profits although event organizers need to consider *"consumer backlash"* (Getz 1997, p.216).

- Yield management recognized that an event usually deals with multiple market segments and, for example, ringside seats can be sold at a premium. Yield management relates service quality to price and enables the event to deal with different economic segments - *"the number of tickets available in each price category should be managed to yield the best revenue picture"* (Getz 1997, p.216).

The third and final phase is selecting a pricing structure. Getz (1997) suggest a range of potential pricing structures: a single admission price; different admission prices based on age, time, group, etc; multi-visit tickets or season tickets; free admission with charges for specific attractions or extras (e.g. parking, reserved seats, programs); admission price plus charges for specific attractions.

Promotional activities

Summarizing the importance of promotion for special events, Goldblatt (1997, p.230) asserts, *"you may have the best quality event product, but unless you have a strategic plan for promoting this product it will remain the best kept secret in the world".* Event promotion is *"the many components that can constitute marketing communications between an event and its potential audience (or customers)"* (McDonnell *et al* 1999, p.110), including tools like advertising, public relations, publicity, direct marketing, sales incentives and merchandising. The promotional plan is mainly affected by the event aims, financial situation and features of the target market (Shone and Parry 2001).

Advertising is a common promotional tool and may use print or broadcast media or mobile platforms (e.g. buses) (Kotler *et al* 1996). Due to the adverts' rising cost, marketers are turning more to public relations (Kotler *et al* 1993), which involve an unlimited variety of activities *"range from ensuring that all of your staff present a tidy and friendly image to the public, to lobbying Members of Parliament and trying to obtain coverage in the media"* (Briggs 1997, p.110). Publicity may appear in the form of press and media releases and guest appearances on talk shows (Davidoff and Davidoff 1994). Special events have a special appeal in attracting publicity as several press and media are willing to cover them (Goldblatt 1997). Intending to guarantee quality, some events produce their own releases before handing them to the media. Direct marketing includes delivering a promotional message to targeted members individually via telephone, Internet, mail, or personally; thus it requires a proficient database on the customers, especially their location and may be especially efficient when targeting small or specified segments (e.g. Opera lovers).

Sales promotion includes providing customers with monetary or non-monetary incentives to enhance sales rates (Weaver and Oppermann 2000). This tool may be effective with segments looking at prices as a priority; nevertheless it may not be the most suitable method for special events. Resnick (1991, p.152) suggests that *"the art of promotional pricing is to use discounts to attract customers initially to products they will buy again at non-discounted prices"*, which is hardly applicable in special events, regarding that they are short-period contemporary occasions. However, Getz (1997, p.310) warns that *"there are risks, such as the possibility that regular admission or sales prices will be undermined"*.

In addition to being an income source, merchandizing can also generate promotional benefits (Weaver and Oppermann 2000), through attracting new customers. Finally, presentation includes the use of uniformed, well-groomed staff members and the attractive physical environment (Weaver and Oppermann 2000), which give potential customers a favourable impression of the event. Presentations cope perfectly with special events, where cheerful uniforms and attractive environment are essential parts of their nature.

Finally, figure 3.6 illustrates the special events planning phase

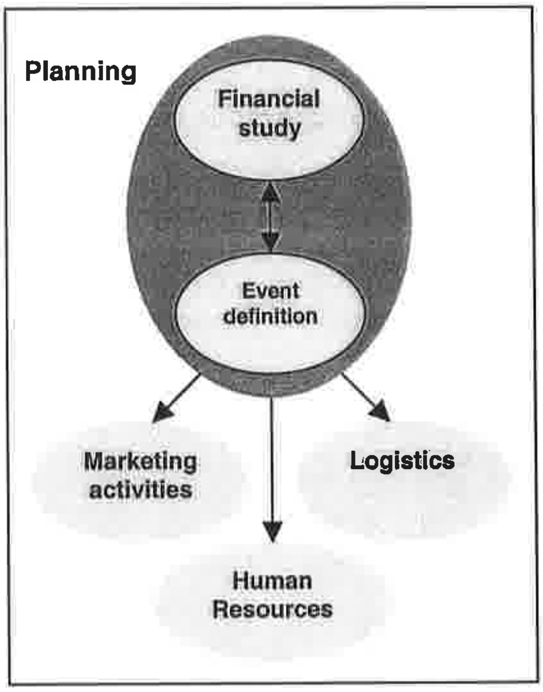

Figure 3.6: Special events planning phase

3.5 Implementation

Although the event implementation phase is the central part of the special event, there is little discussion about it in the literature. Some researchers (e.g. Torkildsen 1993; Appleby 1999; Shone and Parry 2001) investigate the last-minute actions required before releasing the event or by listing general advices. For instance, Youell (1994, p.111) states, *"it is a good idea to hold an eve of event briefing session to go over the final details, iron out any last minute hitches and confirm any alterations to schedules".* Torkildsen (1993, p.7.14) advises *"present event with class...start with a bang...keep coordinator totally free...close event with crescendo...give thanks on the day".* Adding more, Appleby (1999, p.88) advises, *"in the event of disaster...stay calm. Everyone will look to you for the answer; it is not the incident that will be remembered - it is how* *quickly you get things back together"*. Despite the importance of such tips, they do not provide a systematic form of the procedures required in relation to the special event implementation. In this regard, the implementation phase should, arguably, comprise: dealing with contingencies, monitoring implementation and shutdown activities.

3.5.1 Dealing with contingencies

Despite the incremental attention paid to risk management, *"most events are visited by unpleasant occurrences of some sort"* (Armstrong 2001, p.152). As previously mentioned (see section 3.4.3.1), risks can be classified into: hazards against individuals (e.g. fires, stampedes), hazards against proprieties (e.g. thefts, riots) and hazards against activities (e.g. power failure, performers absence). At this point, it should be noted that while, hazards from the first two groups are of a more dangerous and destructive nature, hazards from the third group could affect the customers' satisfaction only.

This is not to say, event organizers should focus less on this last group, but to say that while, the first two groups can be minimized, totally eliminated or controlled if happened, through planning and applying an efficient safety and security plan, such a plan can hardly be applied to the third group. Accordingly, two levels of risk management can, arguably, be suggested: safety and security plan, which aims to prevent, reduce and control any hazards, which threaten the human beings or properties. Second, a contingency plan, which aims to prevent, reduce and control the unexpected situations, which might confuse, delay, suspend or stop the event activities.

Due to the higher hazard of the first two groups, dealing with them is usually confined to the safety and security teams (e.g. dealing with fires or electric shocks should be dealt with through professionals), who apply the safety plan. Due to the wide variety of the third group hazards, handling them is likely to be allowed for a bigger number of staff members depending on the hazard type (e.g. electrician, ushers, gate keepers). *"Contingency plans cannot possibly cover every conceivable occurrence"* (Armstrong 2001, p.152); so on-site staff should not only be trained to cope with the common contingencies, but should also be told what to do in case of any other contingencies for which they have not been trained. In this case, staff members will, arguably, follow one of the patterns suggested in figure 3.7.

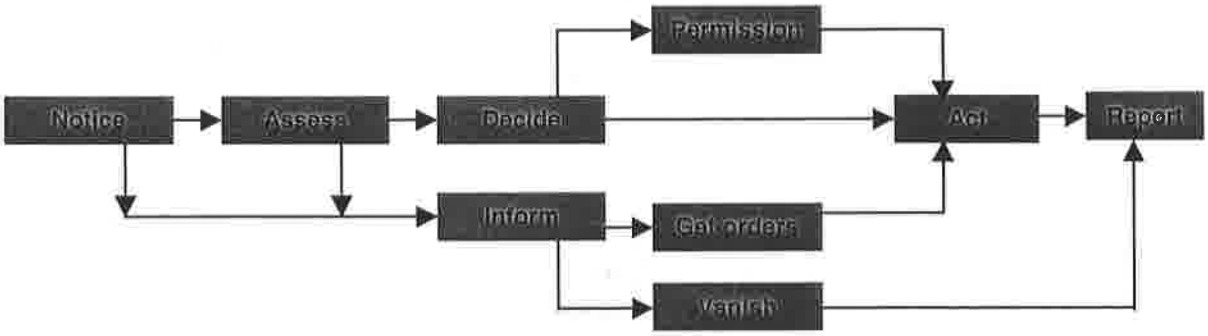

Figure 3.7: Pattern of handling contingencies

Arguably, staff members may be obliged to track one of these patterns (e.g. notice, inform, get orders, act), but they could also be informed about the patterns, and then they are free to select any to follow, depending on their personal capabilities and the situation they face (i.e. different patterns for different situations; different patterns for different capabilities). However, staff should officially report any contingency, which had happened in their areas. Finally, *"Well-prepared leadership and a strong set of contingency plans"* (Armstrong 2001, p.152) and well-trained staff (Abbott and Geddie 2000) are the main elements of dealing successfully with contingencies.

3.5.2 Monitoring implementation

Monitoring implementation can be defined as an *"activity involves comparing the progress of all key functions against a management plan to ensure that projected outcomes are met"* (McDonnell *et al* 1999, p.166) otherwise making corrective actions. Monitoring implementation can also be termed *"process evaluation"* (Getz 1997, p.332). McDonnell *et al* (1999) suggest a three-step plan for monitoring the event implementation.

Establishing standards of performance - these can be derived from several sources including standard practice within the event management, guidelines supplied by the Management Board or specific requisites from the clients and sponsors. The standards must be clear and measurable.

Identifying deviations - by measuring the actual performance and comparing it against the established standards. Different methods can be used for monitoring implementation and consequently, identifying deviations. These methods range from the manager simply walking through the venue to observe implementation, discussing the daily progress with the staff and assessing the customers' satisfaction to implementing a detailed plan of responsibilities using reports, meetings and quality control measures.

Correcting deviations - any performance that does not meet the established standards must be corrected. However, the corrective actions should not be confined to keeping the implementation on the course of the event original planning only, but the executive managers should also be authorized to modify the original plan if they find out that, in reality, it is inapplicable or if the plan application shows certain failure in meeting the event objectives due to drawbacks in the plan itself. The main hindrance, which may obstruct the application of such innovation, could be "the limited duration" that characterizes special events; a feature that might give the event managers no time to notice, compare, discuss, re-plan, and re-implement. Consequently, the executive managers and supervisors' experience and what Getz (1997) calls the "common sense" could be the reasonable last resort for quick innovation if urgently required. However, when the plan is adopted the new modifications must be communicated effectively to all the related staff members.

3.5.3 Shutdown activities

As previously mentioned (see section 3.4.3.3) shutdown activities are an essential part of the special events management, which includes two tasks: dismantling and removing the equipment, and cleaning up. Shutdown activities usually start during the event implementation, where the superfluous equipment, for example, could be immediately dismantled and removed from the site; and of course a cleaning process is always required at the end of each day.

Finally, figure 3.8 illustrates the three aspects of the special event implementation phase

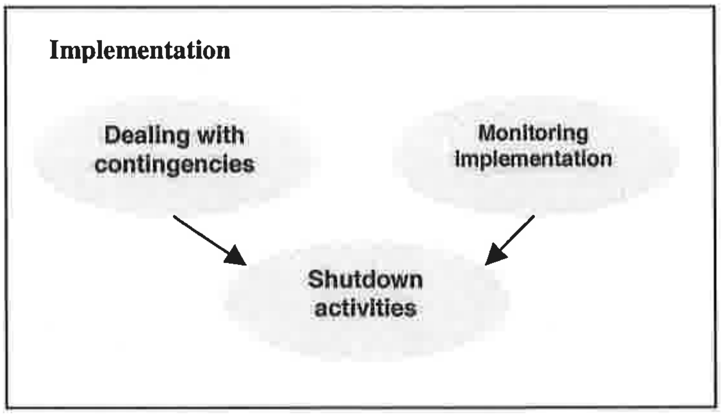

Figure 3.8: The three aspects of the special event implementation phase

3.6 Outcome evaluation phase

Despite the common use of the term "evaluation" when referring to the process of assessing the special event after the end of the implementation phase, some researchers (e.g. Getz 1997; McDonnell *et al* 1999) assert that three types of evaluation occur. First, the formative evaluation, which occurs during the event preplanning period (i.e. during the decision phase), aiming to assess whether it is feasible or not to carry out the event (Getz 1997). Second, the process evaluation that occurs during the implementation phase to monitor the soundness of the plan application and make corrective actions, if required (McDonnell *et al* 1999). Finally, the outcome evaluation, which takes place after the event implementation and is the core of this part.

Special events outcome evaluation *"is the process of looking back at an event, identifying good and bad points, and learning for the future"* (Youell 1994, p.103). Shone and Parry (2001, p.263) notify that "outcome evaluation" usually answers two questions: *"did the event meet its objectives? and what can be improved for the next edition?"*.

3.6.1 Did the event fulfil the required objectives?

Answering this question automatically leads to assessing the degree of the event success. The outcome evaluation could be employed for assessing the objectives fulfilment from different viewpoints, such as the event organization, customers, sponsors, staff (Wicks and Fesenmaier 1993), community and environment. In the context of assessing the objectives fulfilment, a four-step plan can be suggested:

Identifying what to evaluate - as mentioned above, the event can be evaluated from different approaches, so the first step should be identifying precisely from which approach the event will be evaluated (e.g. the event organization).

Defining the data required - assuming that the event organizers want to evaluate the fulfilment of the event's objective, which was to achieve a net profit of £ 20,000; then the data required for measuring this objective would include information about the volume of the costs expanded and revenues achieved during the event (e.g. salaries, admissions sales, merchandizing revenue, catering cost and revenue).

Defining the data collection method - diverse methods can be used for collecting the data depending mainly on the type of data required. For example, surveys can be widely utilized for obtaining data about the attendees' profile (e.g. age, gender, income level), motivation (e.g. leisure, cultural), activities inside the venue and spending patterns. Observation can be used for providing data on the attendees' level of satisfaction. Other tools, such as interviews and focus groups, can also be used. In this regard, staff members have an essential role to play, whether as researchers (e.g. observers, interviewers), or as workers who have personal comments on what they informally saw and heard during the event. Therefore, ideas such as training staff members to register formal (e.g. questionnaires) and informal (e.g. complains and suggestions) feedback from customers can be useful approach for collecting data. However, Youell (1994, p.112) refers to the importance of records as another essential tool *"items such as receipts, financial accounts, attendance figures, video footage, ticket sales, photographs and media coverage, can be used to reflect on the event and draw conclusions".* Records usually have particular importance when quantitative data is required (e.g. net benefit achieved, number of visitors). Finally, a cluster of formal and informal tools could be used to achieve variety and credibility (American Sport Education Programme 1996).

Application, analysis, conclusion and reporting - should start by the end of the event implementation phase, especially when using tools such as observation and on-site surveys. But it could also be done after the event, in case of using tools such as in-depth interviews or focus groups. The collected data should then be analysed to turn the general loose data into clarified outputs, which would be used for assessing the event actual outcome against the event original objectives. The special event's conclusion should then be recorded in a report, which may take the form of brief results, answers for particular questions or more elucidated results with additional explanation or clarification. The report should then be distributed to the event stockholders (e.g. the event organizers, sponsors, senior staff members). The credibility of this stage depends mainly on the efficiency of the evaluation plan and the efficiency and credibility of the human factor.

3.6.2 What are the suggested improvements for the next event?

Referring to the role of the outcome evaluation in providing improvements, Getz (1997, p.331) emphases that evaluation *"is the way to constantly learn... and...improve management"*. In this respect, it is not a must for improvements to mean changes. On one hand, improvements can take the form of recommended changes for some of the event's aspects (e.g. ticket prices, performances), which have shown certain negative impacts on the event's overall outcome. On the other hand, Shone and Parry (2001) argue that improvements can also take the form of further strengthening for the aspects, which went well during the event. However, even though it is a one-off special event, the suggested improvements can be used as a learning tool for those who participated in the event whether organizers, sponsors, staff members or volunteers.

Corporations, such as professional research agencies, universities, and alumni societies, can undertake the "outcome evaluation" on the behalf of the event organization. Appleby (1999) points out that the outcome evaluation process can also include some questions on the behalf of the exhibitors or the sponsors, etc. Also sponsors may conduct their own on-site evaluation (e.g. surveys); *"progressive event organizers will undertake this activity as part of the event evaluation process"* (Coughlan and Mules 2001, p.2) thereby reciprocal exchange of the conclusion can benefit the two sides. Finally, despite the importance of evaluating aims fulfilment, *"social, cultural and environmental measures are often ignored and full cost-benefit evaluations are seldom undertaken"* (Carlsen *et al* 2000, p.248).

Figure 3.9 illustrates a unified theoretical model of special events management.

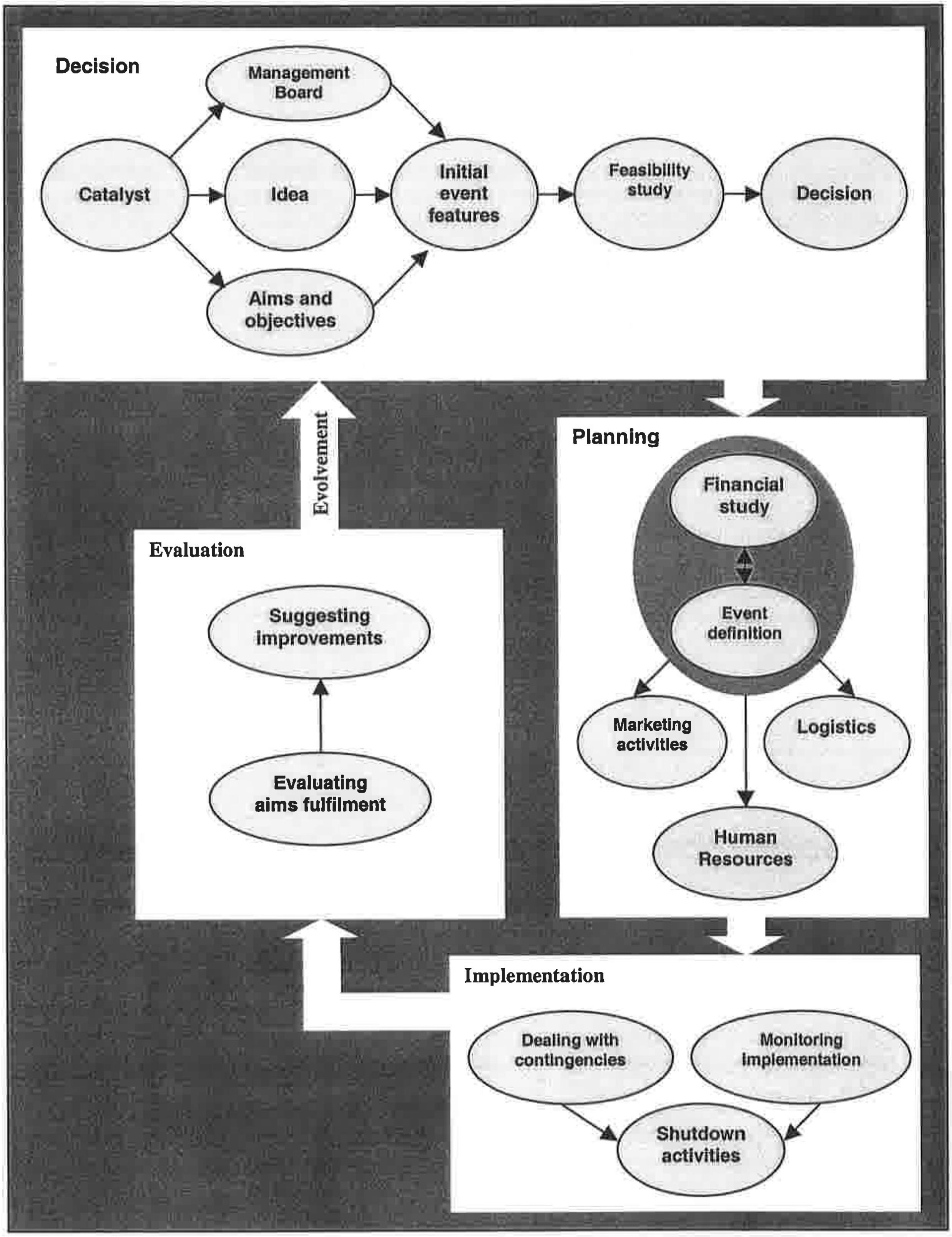

Figure 3.9: A unified theoretical model of special events management

3.7 Summary

The chapter has explored the extensive literature on special events management in order to develop a theoretical model for managing special events. In this respect, the chapter has adopted a relabelled project management cycle of four phases: namely decision, planning, implementation and outcome evaluation as a framework for the analysis of the extensive literature on special events management. These four phases were researched in detail and are brought together into a unified model in figure 3.9. However, despite the extensive literature on special events management, some areas (e.g. implementation and outcome evaluation) are less well recognized by the special events literature, while other areas (i.e. the catalyst's role, idea selection, decision-making and staff structure) were almost neglected. In order to form a comprehensive model, the study supported these less-acknowledged areas, through: first, investigating the literature specified in these areas (e.g. HRM); second, examining the literature related to the tourism and leisure management. The ideas drawn from other disciplines were modified to fit the special events context. Consequently, a unified theoretical model was developed to be used as a projective instrument to stimulate discussion and facilitate data collection in the semi-structured interviews with the Welsh cultural special events organizers (see chapter four).

Chapter four

Cultural special events in a Welsh context

4.1	Introduction	4.2
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4.3	Case two: Mayfair Festival, Museum of Welsh Life	4.8
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4.1 Introduction

This chapter describes a multiple case study of three Welsh cultural special events aiming to investigate the practical managerial models applied in relation to each of these cases from which a consensus can be built on a generic Welsh best practice model. In this context, relying on the criterion mentioned in section 2.4.1.2, three Welsh special events were selected from the Wales Tourist Board's list for special events 2002. The three events are: Llangollen International Musical Eisteddfod (LIME), Mayfair Festival, at the Museum of Welsh Life (MF), and the Urdd Eisteddfod (UE). The three cases were researched via semi-structured interviews associated with both the Delphi and projective techniques, where the theoretical model developed from the literature is used as a projective instrument to stimulate the discussion and to facilitate data collection. The LIME interviews were conducted with the Eisteddfod Board of Trustees' General Secretary, the Marketing Manager and the Human Resources Coordinator. The MF interviews were conducted with the Site Activities Coordinator, the Special Events Manager and the Marketing Director, whereas the South Wales Office Manager, the Arts Director and the Development Director, were interviewed in the UE case. All the interviews were carried out in the interviewees' offices. Some interviewees were interviewed once (e.g. the UE Arts Director), whilst others were interviewed up to three times (e.g. the MF Special Events manager). The interviews length ranged from 35 minutes (the LIME Human Resources Coordinator) to two hours and half (the LIME General Secretary) and all the interviews were recorded with the permission of each interviewee.

4.2 Case one: Llangollen International Musical Eisteddfod (LIME)

Semi-structured interviews were conducted with the LIME Board of Trustees' General Secretary, the Marketing Manager and the Human Resources Coordinator at the Eisteddfod pavilion in Llangollen (about 5 hours and 30 minutes over four interviews). The Eisteddfod idea was proposed by Harold Tudor, who is considered the LIME originator. In 1946, Mr. Tudor suggested the National Eisteddfod of Wales, which was organized then as an Eisteddfod for Welsh music, literature and art, to host international cultural activities as well. But, the organizers, who preferred to keep the National Eisteddfod of Wales exclusively Welsh, refused the idea. However, Mr. Tudor was so keen on his idea that he decided to start a separate Eisteddfod. Being aware of the importance of location, which would host the Eisteddfod permanently, he visited different places before choosing Llangollen on the bases of its natural beauty, which had been acclaimed by many writers at that time. Soon, he was advised to talk to Gwynn Williams, who was a Welsh leading musical figure, music publisher and simultaneously was participating in the organization of the National Eisteddfod. Mr. Williams rather liked the idea and the two men then approached George Northing, who was at that time, the newly-appointed Llangollen Council chairman, who received the idea with enthusiasm. Afterwards, a voluntary board was established from local citizens, who managed the Eisteddfod from there (Attenburrow 1996).

Modelling the LIME

Similar to the theoretical model developed in chapter three, LIME goes through four managerial phases: decision, planning, implementation and outcome evaluation. LIME was firstly organized in 1947, on the inspiration of one man (the catalyst) who provided the idea for organizing an international Eisteddfod for cultural activities (the idea) including musical, literature and artistic activities (the initial features), aiming to make a contribution through the arts into better understanding and friendship between nations (aim). Later on another aim, described as a "pragmatic aim", was added. This was to achieve an annual financial "break-even". Afterwards, Llangollen was suggested as a home for the Eisteddfod (the initial features), and the catalyst proposed the event idea, aim and initial features to the town council and residents who announced their willingness to nominate Llangollen as a permanent location for the Eisteddfod (market research). This led to the formation of a voluntary board of nine local members to manage the event (the Management Board). The potential budget was then initially estimated and four local businessmen agreed to act as guarantors for the event (initial financial study) (Attenburrow 1996). Subsequently, a decision was made by the board to move to detailed planning (decision-making).

Unlike the theoretical model, the first year decision phase differs from the decision phase for the successive iterations of the event. In the subsequent decision phases, the catalyst's role has been terminated and control has been passed to a permanent Management Board, which was later entitled "the Board of Trustees". In addition, the Eisteddfod original idea and aim did not need any further modification, whereas market research was postponed in order to be conducted at the end of the Eisteddfod implementation to provide feedback for the evaluation process. Therefore, the decision phase is now confined to revising the Eisteddfod objectives, forming the initial features and estimating the initial costs in case of adding on new activities, which is almost annually conducted.

> *Our next objective would be to fill our seats...if we are doing something new, it would come from the Board of Trustees as an idea and will be passed down to these various committees, who will say what do they think; is it feasible, is it not feasible and that is the feasibility study...we do make a decision in establishing and forming the initial features; that is the sort of decision we make now.*

LIME organizers deem that the decision phase can be regarded as a seminal planning phase where a decision is to be made whether the potential new features are likely to succeed or not before moving to the detailed planning phase.

> *Well, there is an initial decision that something might be a good idea, but you do a seminal planning; a group of people will and then present it to the Board for a decision, but then after that you go to the detailed planning. Planning has two stages.*

Similar to the theoretical model, LIME organizers agree with splitting the detailed planning phase into five areas: event definition, financial study, HRM, marketing and logistics.

> *Oh, yes, definitely yes. We have the event definition, and we have the financial study, we have a separate arm doing the marketing, various committees doing the logistics, the human resources; so yes, yes very good.*

But, unlike the theoretical model, all the five planning areas are taking place in parallel.

> *I am going to say we will certainly work at all of them at the same time. I find it difficult to tell you what exactly come first.*

During the Eisteddfod week, all the three theoretical implemental areas are undertaken practically. A ground committee is mainly responsible for monitoring the Eisteddfod implementation and taking corrective actions against any deviations.

> *The ground committee has responsibility to all the items on the ground and that now if things go wrong there will be inquiry to see why they did not come on, why they did not keep that or did we alert them in time to do something. There is the chairman of the grounds committee, who has over control the ground itself and if anything goes wrong in this area it is his responsibility to sort it.*

A risk management scheme is applied regarding the potential hazards against individuals (e.g. accidents, stampedes) and property (e.g. fire, thefts), with less awareness regarding hazards against activities.

> *Yes, we come more and more conscious of this, for example, when the children come here from schools, they ask for risk assessment from us before they will come, because they are responsible for the kids, and they get to be sure that we have done everything we can on the ground to make it safe. We also have a fire system, a police member patrols the place during the Eisteddfod...we employ security members...just before the event, we had all the place checked to make sure it is safe...the*

> *seating is all checked to make sure it is in a good order nothing objecting or dangerous. The ground itself has to be stable, not slippery.*

Then a whole week after the event is always dedicated for shutdown activities.

> [The week after we] *Tidy up, we actually take a little bit more than a week to finish it. We do 90% of it in a week, the week after the event, and the 10% during following days.*

Evaluation is always made toward the end of, or shortly after, the event implementation targeting to assess the objectives fulfilment, define the problems and suggest improvements for the following Eisteddfod. Evaluation tools including attendants' comments, staff self-assessment, official records besides market research are utilized.

> *Every year we have a lot of correspondence, some of it is good news but if there is anything wrong we get it written. We record them and we copy them to five or six of the senior members of the Board and the chairman. They read them and decide who should answer them; so it is evaluation; that is only the mail. Also, each committee will know its own problems after the event, then big debates about why did they go this way? How can we improve this? So it is the feedback from the committees themselves...we also have indications like tickets...*[also] *this professional lady who is our marketing director...last year during the event, she had a team of people questioning the audience trying to find out trends and things like that.*

Finally, figure 4.1 illustrates the managerial procedures applied for managing the LIME.

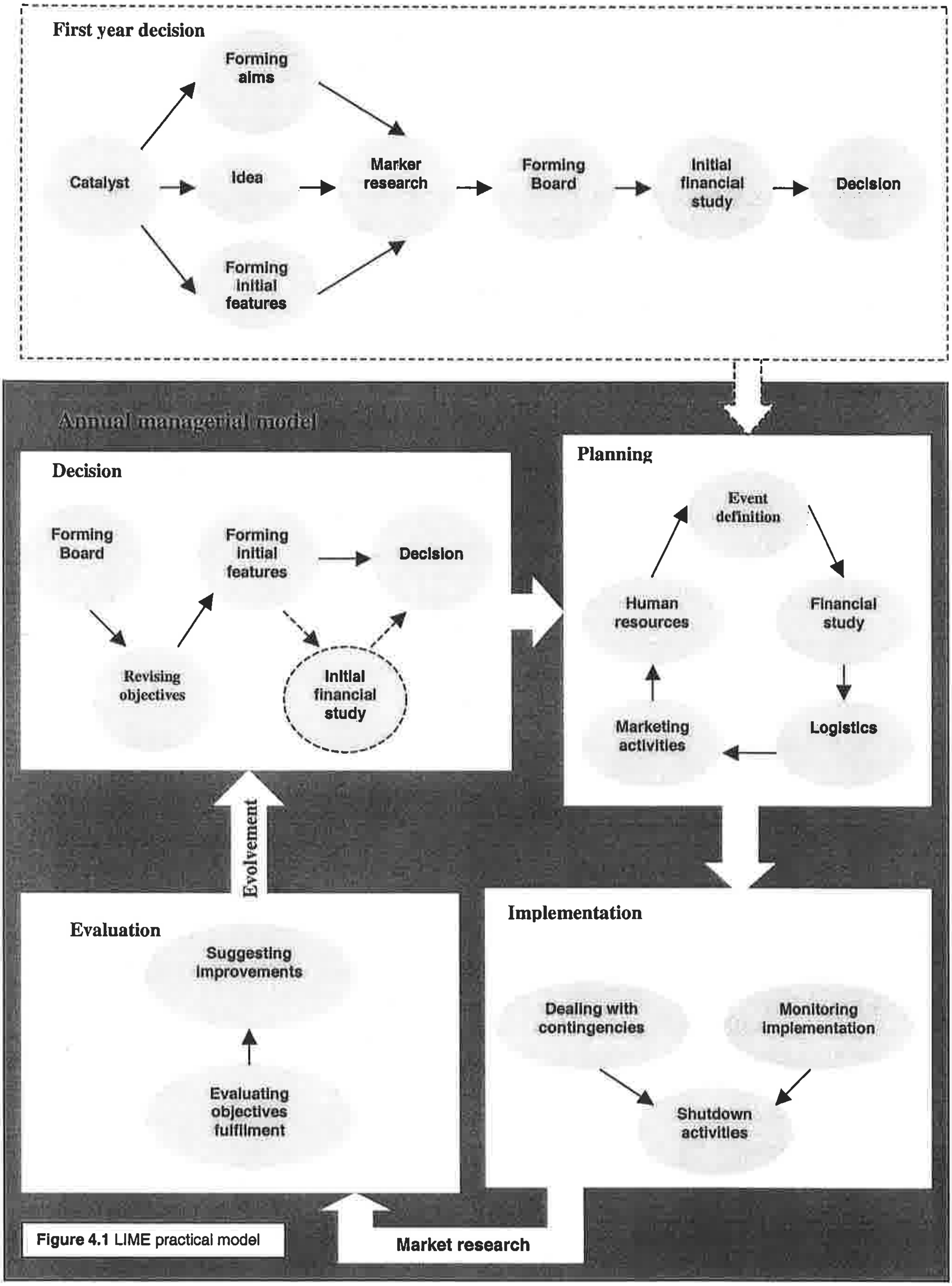

Figure 4.1 LIME practical model

4.3 Case two: Mayfair Festival (MF)

Interviews were conducted with the MF Site Activities Coordinator, the Special Events manager and the Marketing Director. All the interviews took place in the interviewees' offices in the Museum of Welsh Life, St. Fagans (about 6 hours over five interviews). MF is a three-day event, which dates back to the 16th century and signifies the celebration of the start of the Spring season, where traditional activities such as raising the Maypole and folk dancing take place. Despite the long history of the MF, celebrating the festival in the Museum of Welsh Life started only in 1987, but recent changes to the date and the activities, have been made to take the MF back to its more original roots.

> *I suppose, the initial decision of Mayfair was made years and years ago...and I suppose it has evolved from there...it was initially made traditionally, as you saw...latter on somebody from management decided to change the theme annually to try to create a little more interest, because I suppose, they found it was getting a little bit similarly; and people did not want to come back...it is this year we have certainly re-evaluated the idea. We went back to look at the original idea to try to have some more ideas. We are going back to the original date, traditionally at the first of May; so we are going to try how on that day the traditional activities will work...which will be raising the maypole, dancing, some songs traditionally from that period.*

Modelling the MF

Similar to the theoretical model, managing the MF goes through four phases: decision, planning, implementation and outcome evaluation, which form the managerial frame for organizing the festival. Reviving the celebrations of the traditional Mayfair Festival (the idea) was suggested by the Museum of Welsh Life, Marketing Department (the catalyst), in 1987, aiming to increase public awareness of the Welsh and European culture (aim). A board of the Museum senior employees was then formed (Management Board) which defined that the event would include the Mayfair traditional activities (the initial features), before deciding an initial budget for the festival (the initial financial study). Finally, the new idea was proposed to the museum visitors before the decision-making.

> *The idea has been established for long years, but the idea initially came from the marketing department. The idea is part of the traditional Welsh, probably the European culture, as well...it is a way of teaching people about the culture, which they find inside these walls, inside these buildings....it was initially made traditionally.*

Similar to LIME, the first-year decision phase was not repeated in the same sequence. Again the role of the Marketing Department stopped at suggesting the idea, and the festival control was passed entirely to the organizing committee. The festival idea and aim did not need any further discussions; as well, no pre-event market research was conducted. Therefore, the decision phase is now confined to forming the Management Board, Which revises the objectives, forms the festival initial features and undertakes the festival initial financial study before decision-making.

The MF organizing committee comprises members from the curatorial, the conservation, the warding, the marketing and the education departments, besides the estate manager, the museum events organizer, and the site activities coordinator.

> *We have one from the curatorial, because they have the expertise; they have the knowledge; and we need someone from the conservation department because after all we are going into their buildings the buildings that they are charged to look after and they have to find out what we can and cannot do. For instance fire regulations, ten people in some buildings twenty in others...then we have someone from the warding staff, to decide the manning level that we need...how many extra staff do we need, how many extra hours these extra staff will work...and he is the one who looks after all the security aspects... then we have somebody from the marketing department...we have somebody from the education department to make sure that the educational input is sufficient and usually the estate manager is there because he is the one who is able to tell us: well, you can not have this field because we will be planting this with corn...he is the one who knows where on the site utilities are. I* [the museum special events manager] *am getting the budget; it is up to me to make sure that I stay within this budget.*

Being part of the Museum of Welsh life, the Management Board receives predefined objectives. These objectives were estimated in monetary terms until the application of the free-entry where the objectives have been defined according to the number of visitors.

> *Well, normally the aim or the objective was to make money...but this situation was changed last year and we have money from the assembly so we do not have to worry so much about getting in money, but numbers are still important to us. We are still given visiting targets, which we have to achieve. I do not think we are going to hit the target this May actually, we shall see.* [The object was to at least maintain the last year visit number, which was] *19,000 people in.*

Again, the Management Board receives a fixed budget for all the events each April. However, this does not preclude doing a separate initial financial study for each event. Initial estimation for the event costs are assessed and proposed to the events committee, which decides what the event features will initially be.

> *The finance will probably be agreed with the directors…because the directors will deploy the resources...before the end of the last financial year, when we have to profile, we have to say that is what we would like and this is how we spend. I would like X amount of money and if I am guaranteed that amount of money this is how I wish to spend it…[Is money the only justification when making a decision?] Very often it is…the public might say what they are doing? spending our money on something. So you get to be careful, it is accountability all the time. You are accountable to the public because they are the ones who are paying…you also find sometimes that some of your sources for financial support will restrict what you can do…because before it can move on into this [the planning phase], you need to have it sorted out.*

Dissimilar to the theoretical model, but typically similar to LIME, MF organizers believe that pre-decision market research is essential for new events only; then the market research should be moved from the decision phase to be conducted during or after the event implementation for evaluation purposes leading to evolving the festival following edition.

> *We tend to do market research for evaluation and market research to profile our visitors. Probably the first thing you are going to do if you have a chance is to profile your target market…If you are going to start from the beginning, I would say that you need to find out and define who your audience is; if they exist or who they will be...certainly for a new event yes, we do research; we research our audience, so yes pre-event research is important...if you are doing something new you will need to do that…and then after the event that is the time for evaluation.* [Ok, from what you said, are you saying that, if we are doing a new event we should do a market research to provide the required data for the decision making then another market research during the evaluation phase to evolve the following events; then to keep doing the post-event market research with each edition?] *Yes, that would work.*

Similar to the theoretical model, all the five areas of the planning phase existed in the case of MF. Unlike the theoretical model and due to the constraints of the predefined budget, the financial study is brought forward and has an major influence on the planning of all the other four areas, which occur in parallel without explicit chronological sequence.

> *I am given a budget, which is not vast. The head of the education department in Cathys Park decide what my budget is going to be for the year, and that is it...*[No matter what are the activities?] *Absolutely, this is my budget...now right; I have 400 pound here what will I do? Do I Invite two bands in or a marquee. That is the problem of money...I think money is the core of it.*

However, it might worth mentioning that due to the application of a free-entry policy in the UK museums since April 2002, the average number of the festival visitors has risen to around 20,000. Consequently, the promotional activities have decreased.

> *Free entry was granted to all the museums; and as a result of that, the free entry, we have been inundated with visitors and so to an extent, marketing was no longer needed because people are coming in any way. They know they can come in free. So the marketing side has dried up considerably.*

Due to the financial situation, which requires determining the events calendar a long time ahead to get the annual budget, MF organizers claim that managing MF is a continuous process over the year. However, the planning phase averagely needs six to nine months.

> [We start discussing the details] *about six months or nine months before; it is six to nine months in advance.*

All the three theoretical implemental areas are applied practically during the event. In the respect of monitoring implementation, the site was divided into four zones with a senior staff member allocated to each zone to monitor the event and implement any required remedial action for correcting any deviation.

> *It was defined roughly in our minds into four zones. So there was a zone over that side of the museum which...Mathew* [the site activities

> coordinator] *is charge of. So the bands coming in were met by Mathew. He looked after them; and there were three other zones on that site and there were one person designated for each zone…and there is no: oh gosh, I do not do that… sometimes I have seen my boss climbing over the fence to do the electricity...it can be very lonely job because you have to make the decision at that time and if it is a wrong decision you have to learn to live with it.*

Similar to LIME, a risk management scheme is applied regarding the potential hazards against individuals (e.g. accidents) and propriety (e.g. fires).

> *Usually the head warden and I get together and we look at the event…I wonder we may have something on here; we assess the different risks. Some actions we may take to ease those risks…I mentioned the storytelling…they have been taking part in one of the small cottages but that had to stop because fire regulations deem that only something between 15 and 20 people are allowed in the building at any one time…so that location had to be moved to somewhere more suitable.*

On the other hand, the problem of fund insufficiency condenses any plan for confronting the hazards against activities.

> [During the event, do you have the elasticity to face any problems concerning the activities?] *Not really, simply because the budget does not allow it. I mean, in an ideal world, I would have tents, so if rain comes people can go to the tents, but sadly no…it is not ideal because if people come here with the expectation of seeing and it suddenly does not happen they go disappointed and they may not want to come back. But until I am given a realistic budget, it is really the only way I can offer it. In theory, yes we have plan A and plan B, but in reality, no, it does not work…two years ago, at the Halloween event, I invited a Brazilian dancing group to come along and perform the Brazilian dance of the dead. Everything was ok; until two or three minutes before the performance, it hammered down. I have no wet-weather plan. So they had to come to the main entrance hall, and I had all those people dancing in the main entrance hall and dozens and dozens of members of the public crowding around them; and all what I think: oh, God, no fire, because it will be trouble. And so we had to look at that and decided we cannot really have those people here again.*

Typically, shutdown activities take place after the festival.

> *Shutting down yes, yes. That tends to be done by the site handy men. The people who fetch the tent will come in and take the tent down; and the electrician will collect all the cables; and then the handy men will come around and physically empty the bins or move the chairs back around the tables.*

Evaluation starts immediately after the implementation. Unlike the theoretical model but similar to LIME, market research is done during and after the implementation. Other evaluation tools, including staff assessment and public comments are also utilized to assess the aims fulfilment and to provide ideas for improvement. Although evaluation is always done, MF organizers deem that the evaluation conducted is insufficient due to shortage in time.

> [Does this evaluation phase reflect what you do here?] *Oh, absolutely, yes…during the event we try to ask people to fill in forms to tell us how they find out the event…we do have a debriefing after the event…we tend to sit down and go through it but not in the depth that we need to do to improve our product the next time…we do not spend what could be enough on the evaluation afterwards; and I think is because as soon as one event finished we hit into the next event and there is no time to do the evaluation, which is probably our loss because I am sure there are things, which we could do better or differently...we invite members of the public to make comments.*

Finally, figure 4.2 illustrates the managerial procedures applied for managing the MF.

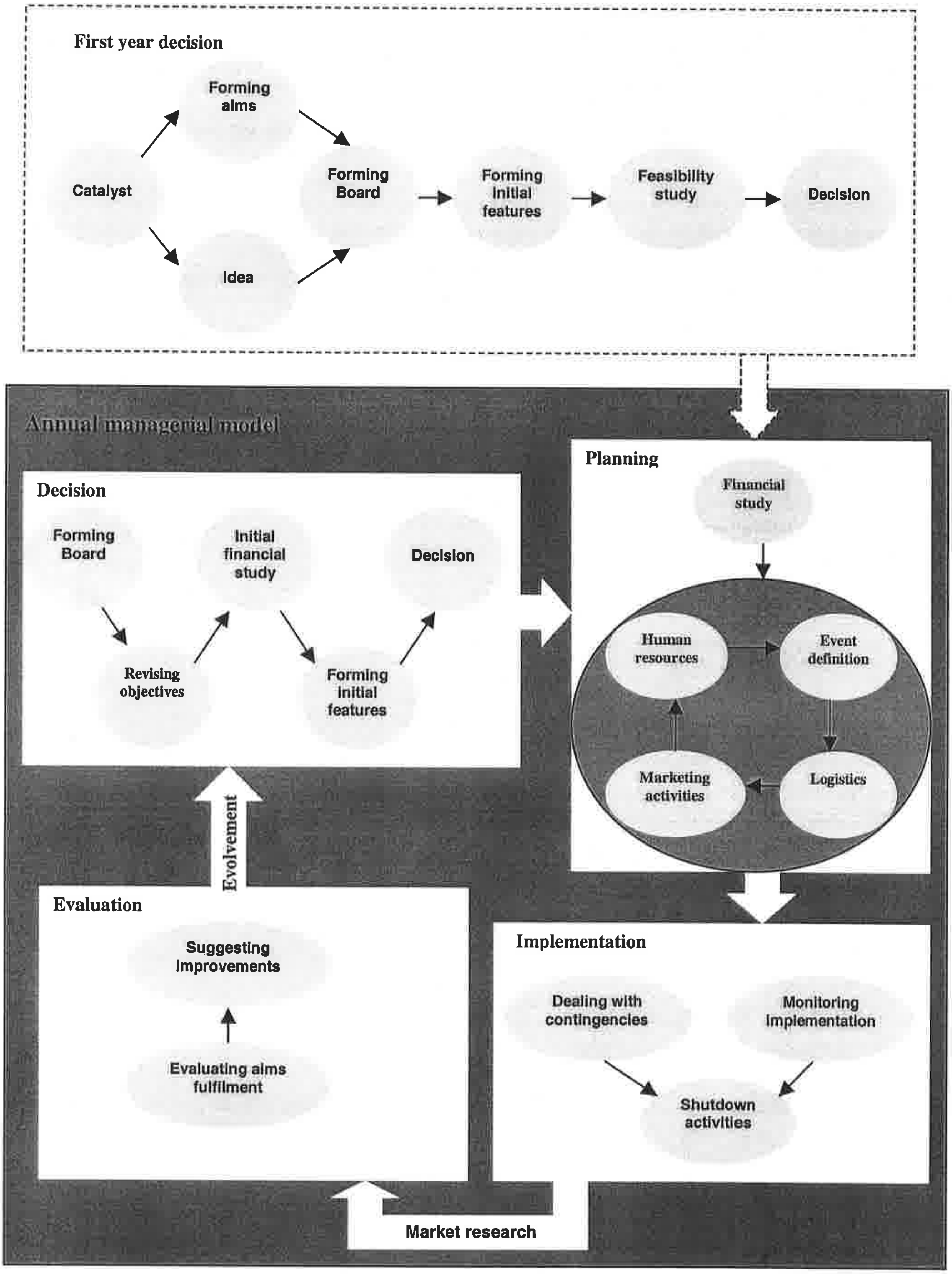

Figure 4.2 MF practical model

4.4 Case three: Urdd Eisteddfod (UE)

Semi-structured interviews were conducted with the UE South Wales Office Manager, the Activities Director and the Development Director in the Urdd South Wales office in Cardiff (about 4 hours over three interviews). In 1922, Sir Ifan ab Owen Edwards, a history lecturer, founded the *"Urdd Gobaith Cymru Fach"* (i.e. Urdd, the Hope of Little Wales) as a consequence of long years of enduring working for enshrining the Welsh culture, especially the Welsh language. The Urdd was the third attempt of establishing a Welsh children's movement, following two unsuccessful attempts in 1896 and 1911. Referring to the Urdd aim, Sir Edwards alerted *"our country is submerged by the English flood; we must act now to prevent our children being swept away by the tide"* (Davies 1973, p.8). As a result of Sir Edwards' touching message, which was published in the *Cymru'r Plant* - a monthly children magazine -, hundreds of Welsh citizens applied instantly for membership in the new organization, which managed youth activities such as camping and rallies. Then, it was 1928 when the members' number recorded 5000 and when the word "*Fach*" (i.e. little) was omitted from the organization title, which has been known ever since as *"Urdd Gobaith Cymru"* (i.e. Urdd, the Hope of Wales). At the same year, an idea for organizing a national Eisteddfod, in which all Welsh children and teenagers compete in artistic activities, was put forward (Davies 1973). However, the Urdd organization ends up nowadays with managing four main activities: the Urdd Eisteddfod[1], two permanent campuses, local sporting clubs and a monthly magazine.

Modelling the UE

As with the theoretical model and the previous two cases, the UE organizers believe that the management of the UE goes through four managerial phases: decision, planning, implementation and outcome evaluation. UE was firstly organized in 1929, on the inspiration of Sir Ifan ab Owen Edwards (the catalyst) who proposed an idea for

[1] The Urdd Eisteddfod is known, as well, as the Welsh League of Youth

organizing a national Eisteddfod where children and teenagers compete in Welsh cultural activities including music and drama (the idea), aiming to encourage the Welsh children and teenagers to preserve their Welsh culture, especially the Welsh language and to give them the opportunity to develop their artistic skills (aims).

> *He started it himself. He had the full idea himself, and then from there onwards it just grows and grows and grows...he knew what he wants to do...he decided what he wanted...at that time he had a full vision of what the Urdd would be.*

Afterwards, Sir Edwards invited the Urdd members in Corwen to a meeting to make preliminary arrangements for the Eisteddfod, which was decided to take place in their town (unlike the meeting held at the beginning of the LIME, this meeting is not considered as a sort of market research as it was not aiming to survey the attendees' opinions. Due to historical circumstances, Sir Edwards announced previously that the Eisteddfod would be held whatever the people believe in it). However, the meeting led to the establishment of an organizing committee (the Management Board), which decided that the Eisteddfod would be a two-day event, with drama competitions, where a few trophies were to be awarded but with no monetary prizes (the initial features); and during the months that followed, the committee met frequently to ensure detailed planning for the Eisteddfod (Davies 1973).

Evidently, no feasibility study (i.e. neither market research nor initial financial study) was conducted before the first event decision-making.

> *I doubt very much whether there was any market research in the beginning.*

Similar to the previous two cases, the first year decision phase was not repeated in the same sequence. Typically, the catalyst role stopped. As well, the event idea and aim required no more discussions; nevertheless, the Board changes the Eisteddfod objectives, which are evidently revised every year. Additionally, the Eisteddfod features (i.e. location and activities) are altered according to what is revealed from an initial estimate of the financial situation, before decision-making.

> *As a festival, that has been running now for years and years. The catalyst as you say here, that is something that happens automatically now. We do not provide a new idea every year; there is a formula now, which is just simply adapted and changed according to location; according to the population of the area; according to the finance that we have because there is a three-year build up to an Eisteddfod. We can work out then according to the finance we have what is feasible for us to do...in Cardiff 2002 Eisteddfod, there were over 100,000 visitors our objective therefore was to attract the same amount if not more this year...it is certainly an objective to at least keep the same amount of competitors, which is 15,000...forming the initial features, that would be depended on the finance then...if the Eisteddfod comes to Cardiff; the reason we come to Cardiff is because we are invited by the Cardiff council to Cardiff and then as part of that we expect the council to make a financial contribution...*[So, you investigate the financial sources before forming the initial features] *yes; yes definitely...in terms of decision, there is no decision because the Eisteddfod happens. So in some sense, but there are decisions on what sort of Eisteddfod it would be.*

Obviously, no market research is conducted during the decision phase, but during or shortly after the event implementation for evaluation purposes. However, UE organizers believe that market research could be important for new events before making decisions.

> *I do not make the market research and then make a decision...because we by now are a mature festival that happens every year. I am not saying that there is not any space for us to improve but there is some kind of formula that tends to work; but maybe if I would start tomorrow to organize a new one, I would do some form of market research...we did some market research, questioning people about did they enjoy? Where did they find out about the festival? We try to evaluate how much our marketing materials, sort of, reach these people, you know, how affective it is really...this one is for next year. I mean the results we have this year will be used for next year.*

Similar to both the theoretical model and the previous two cases, UE organizers agree with the detailed planning phase five areas.

> [Do you think these five areas reflect your planning procedures or do you suggest to combine any of them together or to add more areas?] *No, that really covers everything as far as what we here do...I cannot see anything missed. I think everything will fill into one category or the other.*

Nevertheless, similar to the MF case, UE organizers deem that the financial study usually precedes and affects all the other four areas.

> *The financial affects on how much marketing you can do and how much human resource you have and what is the scale of event. So I think you are quite right... I would see event definition as what activities we have on the site and that does depend on the financial planning.*

Whereas decision phase starts three years ahead, detailed planning commences two years in advance.

> *We do not actually start the organizing for till about two years in advance. It is a full two years I will say, and it is very difficult in less than that, because there are many things to put in place, you know.*

During the six days of the Eisteddfod, all the three theoretical implemental areas are similarly applied practically under the management of a site manager who supervises a trained team responsible for managing potential risks. All staff members are required to report any risk or implementation problems immediately to the site manager.

> *We have a site officer; he concentrates more on these sides, the implementation side. He is in charge of this side...we have a small team of staff. There are representatives from the local party they go around during the week checking that everything is ok, and check every morning before the festival opens everyday. On top of that we have around about 25 trained stewards. We have people who have been through fighting fires, you know, familiar with tracking risks, and would have training in advance. They are walking through all the day...if I saw something I would refer to him, but he would be in charge for all of these things.*

Finally, dismantling the equipment and cleaning the site is usually conducted immediately after the end of the event activities.

Similar to the previous two cases, evaluating UE starts as the implementation phase is being completed; nevertheless, most of the evaluation takes place afterwards. Many evaluation tools including volunteers, staff and Board members' reports, customers, sponsors and merchandisers' survey and official records are all used aiming to improve the subsequent Eisteddfod.

Yes, there is always evaluation after the Eisteddfod…one of the first things that we do is: we ask local volunteers with different interests to write us a report how they think things went. We call a meeting of the staff together 3 weeks after the festival to ask them for their feelings and staff from outside the Eisteddfod…they offer us their general comments, their suggestions their ideas on how could we improve; what did work; what did not work…internally, then old staff are evaluating within the departments and sponsors attend sometimes…a survey of people who are visiting…a survey of people who took stands there...I have to prepare some evaluation reports for sponsors and people who gave us money. So I use all the information I have about visitors' number and things like that.

Finally, figure 4.3 illustrates the managerial procedures applied for managing the UE.

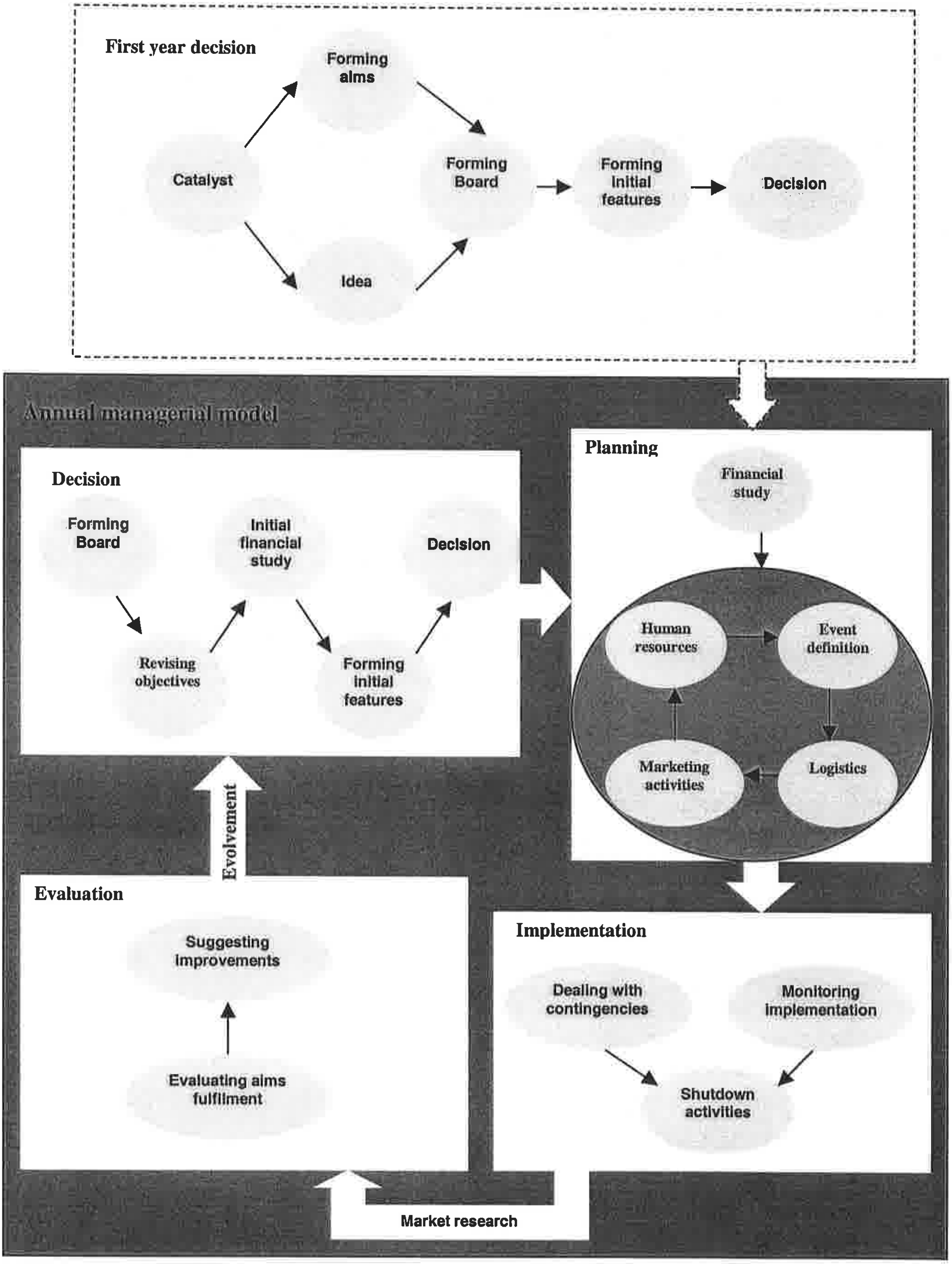

Figure 4.3 UE practical model

4.5 Discussion

Like the theoretical model derived from the literature, each of the annual managerial models for the three Welsh cases splits into four phases: decision, planning, implementation and outcome evaluation, to form the managerial frame for organizing the events.

While the theoretical model claims that the decision phase would be repeated through subsequent event iterations, the Welsh cases reveal that two distinct decision phases are undertaken: first, a non-recurring decision phase for the first event only; second, a recurring decision phase for all the subsequent events. However, the theoretical decision phase seems more analogous to the non-recurring decision phase.

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

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

Despite the similarities amongst the three Welsh cases regarding the application of the planning five areas (i.e. financial study, event definition, marketing, human resources management and logistics), evident distinction emerges concerning the sequence of those five areas. Whilst, LIME organizers assert that all the five planning activities take place at the same time where mutual influence emerges among them; both MF and UE organizers state that the financial study usually takes place prior to all the other four activities, which are all influenced by the financial study outcome. However, this could be due to the fact that, while LIME depends principally on self funding, which gives the organizers the freedom to alter their budget regarding the other planning activities (e.g. marketing, event features), the other two events depend mainly on restricted predefined funds from external entities (i.e. the Welsh Assembly and the hosting local council), which necessitate considering the financial availabilities before doing any other planning activity.

All the three Welsh cases show identical similarity with the theoretical model in relation to the implementation phase, where three activities emerge: dealing with contingencies, monitoring implementation and shutdown activities.

Unlike the theoretical model, all the three cases relocate the market research to the end of the implementation phase or shortly after, aiming to provide feedback for evaluation. Evaluating the three Welsh cases starts immediately or shortly after the event implementation to assess whether the event fulfilled its objectives or not, and to provide feedback for evolving the following edition. Several tools including public comments, staff self-assessment, official records, customers and sponsors surveys are utilized.

4.6 Building a consensus

As mentioned before (see section 2.4.2.2), the Delphi technique is a well-established mean for building experts' consensus, as it involves the gathering of information from a group of experts in a certain field where they indicate their views on a certain topic. These views are then analysed, summarized and circulated to the experts who are asked to indicate which opinion they think to be the most appropriate and if they want to modify their ideas in the light of the opinions of the other experts; a process which might be repeated number of times before a final consensus is collected, depending on the extent to which the initial opinions are similar (Green *et al* 1990; Veal 1997; Bramwell and Hykawy 1999).

In this respect, a copy of the three models besides a copy of the above-mentioned conclusion, which emerged from the investigation of the Welsh cases, were handed to the LIME General Secretary; the Museum of Welsh Life, Special Events Manager and the UE South Wales Office Manager. They were then invited to revise the three models and the conclusion, before giving their opinions on what they think would be the most appropriate for building a generic Welsh best practice model for managing cultural special events. Building a consensus required only one additional round, as the differences between the three Welsh cases were minimal. Those differences were confined to: first, the relation between conducting the initial financial study and forming the initial features (the decision phase); second, the relation between the financial study and the rest of the planning areas (the planning phase). All the three cases were identical in relation to the implementation and evaluation phases.

4.6.1 Llangollen International Musical Eisteddfod

The LIME General Secretary was interviewed in the Eisteddfod pavilion in Llangollen, where he was handed a copy of the three models besides a copy of the conclusion, which emerged from the first round of the Welsh cases investigation and was asked to revise them, before defining the opinion he believes to be the most appropriate for building a Welsh best practice model for managing cultural special events.

Regarding the three Welsh models, whereas LIME board firstly forms the initial features, before undertaking an initial financial study in case of new activities only, prior to decision-making, both the MF and the UE boards start by undertaking the festival initial financial study, which leads then to forming the festival initial features, before decision-making. The LIME General Secretary firstly identified this difference between the LIME model and the other two patterns as:

> *A main difference here is the sequence of both forming the features and conducting the event initial financial study.*

Due to financial shortage, the LIME General Secretary records that LIME is about to change the sequence of its managerial procedures to undertake initial financial studies before forming the Eisteddfod syllabus (i.e. the Eisteddfod features), which indicates that the LIME model would then be following the pattern of both MF and UE.

> *Concerning the relation between the financial study and the features...It is interesting because, it is almost something that quite dangerous...our model has been very good until now, but we have some crises with our building, because it is of temporary nature, and it is going to need a replacement, so we will then be looking for major funds from other parties, but obviously if you are very involved in this sort of big expenditure, we seem to be totally isolated within our own resources, suddenly we have to start doing more financial studies before anything else, certainly on a long-term business plan. We probably employ professionals to do feasibility study to ensure the examination. I do not think we have the expertise on board to tackle such major problems.*

A second difference between the LIME model on one hand and the models of both MF and UE on another is the relation between the financial study and all the other planning areas within the planning phase. Whereas, LIME organizers asserted that all the five planning activities take place at the same time where mutual influence emerges between them; both MF and UE organizers stated that the financial study usually takes place prior to all the other four activities, which are influenced by the financial study outcome. The LIME general secretary states that the Eisteddfod syllabus (i.e. the event features) for the year 2005 will be produced in January 2004 based on the results of an on-going financial study, which depends on the elements of the last available actual budgets (i.e. the budget of LIME 2002). Both these changes emphasise the increasing attention that the LIME organizers are paying now to the LIME financial situation and its influence on all the other procedures.

> *We produce an annual syllabus, and we now prepare the syllabus for 2005, because we have to print it by January next year, now the people that are making the syllabus, the musician and the people who are actually concern with the competitions need details and it is very easy to just rollover something that you have been doing without having a complete analysis of what is ahead of it in 2005. So I think we have beginning to realize that much more of our planning has got to take place about 2 years in advance…and gradually, this is having its effect; we are doing things now. We are doing long-term budgets. We know 90% of it now; it is going to rollover, basically, the same of the last year budget.* [Does that mean you would start by the financial study?] *Certainly, yes…*[so if I am going to suggest a unified model, will you suggest following the MF and UE pattern regarding the position of the financial study?] *Definitely, definitely.*

4.6.2 Mayfair Festival

The special Events Manager in the Museum of Welsh Life was interviewed in her office in St. Fagans, where she was handed a copy of the three models besides a copy of the conclusion emerged from the first round of the Welsh cases investigation and was asked to revise them, before defining the opinion she believes to be the most appropriate for building a best-practice model for managing cultural special events.

Regarding the above-mentioned differences between the three Welsh cases, the MF manager believes that their managerial model offers them an efficient and successful framework for their event, which they consider successful. In addition, she believes that conducting the financial study (whether during the decision or the planning phase) before any other activity is essential for them to guarantee keeping the expenditure within the predefined budget. Consequently, she declares that there is no reason to change the sequence of their current managerial procedures.

> *I would suggest this model for you* [the MF model]. *Get the money organized first and we have a saying in English "cut you coat according to your cloth"*[2]. *So you do not overspend. You know what your budget constructions are; and you stay as far as possible within those. Definitely that is what works for us and obviously that is what works for the Urdd. It worked for us; there is no reason why should not it work for you? So it has obviously been tried and tested over the years. They do not see they need to change it. I do not see I need to change it here. And in many ways I think Llangollen maybe needing now to see things through our eyes...I can not see any problem at all with it* [the MF model].

4.6.3 Urdd Eisteddfod

The Urdd South Wales Office Manager was interviewed in his office in Cardiff, where he was handed a copy of the three models besides a copy of the conclusion emerged from the first round of the Welsh cases investigation and was asked to revise them, before defining the opinion he believes to be the most appropriate for building a Welsh best practice model for managing cultural special events.

In this respect, the UE South Wales office manager believe that the UE model provides an efficient pattern for managing the Urdd Eisteddfod, which improve incremental success over the Eisteddfod's long history. However, conducting the financial studies in advance, whether during the decision phase or the planning phase, offers them security against financial loss, as it guarantees the financial support at the outset before designing any features.

> *I think I will keep this one* [the Urdd model]*; I think we have to stay with this one. I cannot see the other way would work. You have to find out what amount of money they will give you and after that you study the event definition or whatever...yes, that is the way; otherwise you might lose, financially I mean.*

Finally, it should be revealed that none of the event organizers believe they can suggest any consensus on the non-recurring decision phase, assuming that it reflects

[2] Surprisingly, the same words were precisely repeated by the UE Activities Manager who used the same saying to express the same idea when discussing the importance and procedures of the initial financial study (see section 7.3.2). However, such resemblance could be noticed in several other areas.

the historical circumstances surrounding each catalyst separately and can hardly be predicted or modified.

4.7 Conclusion

Due to the minimal differences, which have been emerged between the three Models applied in the three Welsh cases, building a consensus on a Welsh best practice annual model for managing cultural special events was possible.

On one hand, some dissimilarities emerged amongst the three Welsh practical models regarding the first year decision phase. However, the Welsh practitioners believe that these specific dissimilarities should be contributed to the historical circumstances, which faced the catalysts during the formation of each event. Thus, the Welsh practitioners record that they can hardly claim the possibility of building a consensus on the first year decision phase. As a result, no consensus was approachable concerning that phase. Consequently, the first year non-recurring decision phase is disregarded and therefore the Egyptian models will be compared against an annual best practice model for managing cultural special events in Welsh context without considering the first year non-recurring decision phase.

On the other hand, the three initial Welsh managerial models showed complete agreement regarding the existence of a managerial framework, which consists of a four managerial phases namely: the decision, planning, implementation and evaluation phase. As well, the three Welsh cases demonstrated a full similarity in relation to the procedures, which should be undertaken during the implementation phase (i.e. dealing with contingencies, monitoring implementation and shutdown activities) and the evaluation phase (i.e. evaluating the fulfilment of the event aims and providing improvements for the following event).

In relation to the recurring decision phase and the planning phase, the three Welsh models identified two dissimilarities related to the timing of conducting the initial financial study (during the decision phase) and the detailed financial study (during the planning phase) and consequently their influence of the other managerial activities.

In this respect, an extra single round of interviews was sufficient for building a consensus where the LIME interviewee claims adapting the model applied in both the UE and the MF. As a result a consensus was built on a recurring decision phase, which comprises of forming the Management Board, revising objectives, conducting initial financial study, forming the event initial features and decision-making. A consensus was also built on a planning phase, which comprises of a financial study that precedes four parallel activities namely: event definition, marketing activities, human resources management and logistics.

Consequently, an annual best practice model for managing cultural special events in a Welsh context was concluded as illustrated in figure 4.4.

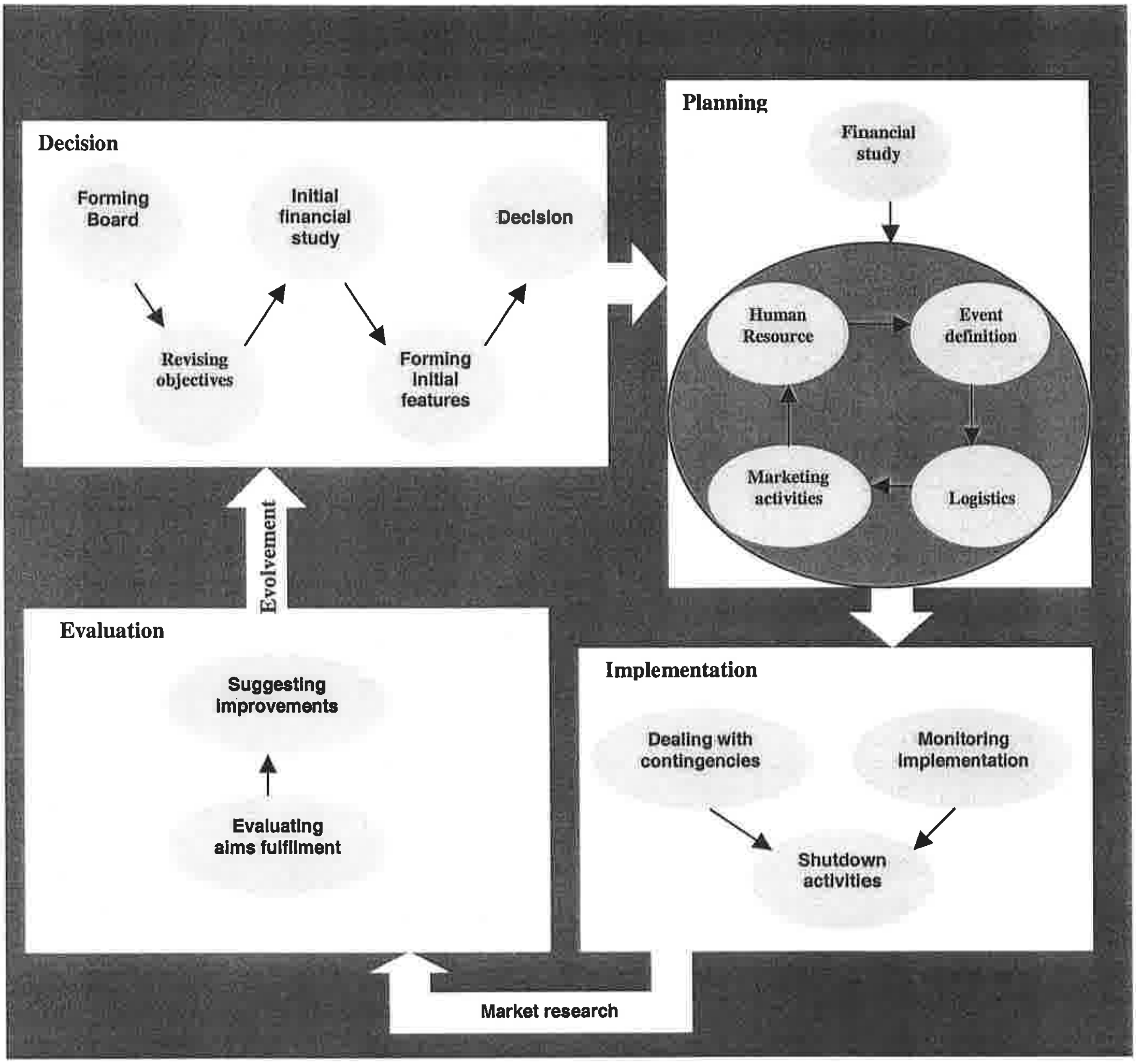

Figure 4.4: An annual best practice model for managing cultural special events in a Welsh context

4.8 Summary

This chapter describes a multiple case study of three Welsh cultural special events (i.e. Llangollen International Musical Eisteddfod, Mayfair Festival, at St. Fagans, and the Urdd Eisteddfod) where the theoretical model, revealed from chapter three, was used as a projective instrument to stimulate the discussion and to facilitate the data collection on Welsh practical managerial models. The semi-structured interviews with the Welsh practitioners resulted firstly in three reasonably similar managerial models, which reflect the managerial procedures conducting for organizing those three Welsh events. However, minimal dissimilarities existed between the three Welsh models regarding the initial and the detailed financial studies. Consequently, a Delphi technique was utilized to facilitate building a consensus, which resulted in the development of a unified Welsh best practice model for managing cultural special events.

Chapter five

Investigating the Egyptian cultural special events management

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5.3	Case two: Ismailia International Folklore Festival	5.10
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5.1 Introduction

This chapter describes a multiple case study of three Egyptian cultural special events aiming to facilitate comparison and then identify the major differences between the best practice model developed from the Welsh cases and the Egyptian practice. In this respect, three Egyptian special events were selected out of the Egyptian Ministry of Tourism agenda of special events 2002 relying on the criteria mentioned before in section 2.4.1.2. Those events are: Nile Bounty Festival (NBF), Ismailia International Folklore Festival (IIFF) and Aida Opera Performances, Pyramids (AOPP).

The three cases were examined through detailed investigation of the documents related to each event. In all the three cases documents were traced to several government entities where the documents provided details of the managerial procedures employed for organizing the events including dates, which facilitated the development of three chronological models for cultural special events management in an Egyptian context. The three Egyptian models were then compared against the best practice model concluded from the Welsh cases. The comparison revealed eight dissimilarities, which were then discussed with the Egyptian events' organizers, through semi-structured interviews, aiming to identify whether they represent actual problems to which the failure of some of the Egyptian cultural special events can be attributed or not. The interviews revealed that, from the Egyptian practitioners' viewpoint, six out of the eight potential problems should be considered actual problems to which failure could be attributed.

5.2 Case one: Nile Bounty Festival

NBF was examined by investigating the documents relating to the NBF 2002. The documents were traced between the Conferences and Special Events Department, Ministry of Tourism, the Regional Association for Tourist Promotion, Cairo (RATPC) and Cairo Governorate General Secretary. The documents supplied by the Ministry of Tourism provided data mainly on the NBF aims, expenditure, programme and copies of the press articles on the NBF. The documents provide by Cairo Governorate, especially by RATPC, were more involved in demonstrating, in detail, the managerial procedures used for organizing the event including dates. These documents took the form of dated official correspondence between RATPC and the entities participating in the event. All the documents were investigated inside the above-mentioned governmental offices, with no restriction regarding the use of any document. Photocopying official documents is disallowed, according to the Egyptian Administrative Law, but written copying is fully accepted.

The NBF dates back to the Pharaonic era, where it was typically organized at the 15th of August annually in the occasion of the Nile flood. The celebration was built upon the idea of sacrificing for the Nile as a sign of thankfulness. The Ancient Egyptians celebration was well known for the Nile parade, which was guided by the Pharaoh and the priests who were marching from the main temples toward the Nile symbolizing their sacrifice by throwing a bunch of Lotus flowers into it. However, since the Roman occupation of Egypt 31 B.C, the celebration was abandoned (Seleem 1997; Elsabahy 1993). The festival was then revived in 1992[1] when the Ministry of Tourism (the catalyst) suggested restoring the Nile traditional celebration (the idea) aiming to enrich the international tourists' programmes and to offer free entertainment to the Egyptian citizens (the aims). However, the Ministry of Tourism suggested Cairo Governorate to organize the event annually through the Regional Association for Tourist Promotion,

[1] Since 1999 the NBF has become part of the Cairo National Celebration.

Cairo (RATPC) (the responsible body). Receiving the idea and aims, the only task that RATPC undertook was forming the festival Management Board.

5.2.1 Order-flow phase

However, the first year decision phase was not repeated in the same sequence after the first year. The Ministry of Tourism role was afterwards limited to partly funding the event. The event idea and aims were not modified after the first year. Thus, the NBF annual decision phase was confined to forming the Management Board, by the RATPC, about three months ahead. The Management Board consists of 15 members. The majority of them were coming from a security background (five members) and a tourism background (five members). Surprisingly, no special events specialists appeared at all.

Comparing the NBF decision phase to the suggested best practice model reveals that:

- First, while special event professionals should logically be the key members of the Management Board, the tourism and leisure experts were few (i.e. five out of fifteen members), while the special event professionals were totally absent.
- Second, while the aims, in the Welsh best practice model, are always associated with SMART objectives. In the case of NBF, objectives did not exist at all.
- Third, while in the Welsh best practice model the event features were initially formed mainly to facilitate conducting an initial financial study, in the case of the NBF, no initial features were formed.
- Fourth, while an initial financial study is mostly required to give indications of financial feasibility before decision-making, no initial financial study was made before deciding whether the NBF should be launched or not.

- Fifth, while the decision of launching an event should ideally be justified by a feasibility study or at least, the experts' opinion (mostly in case of new events) or previous success (in case of recurring events), the decision of launching the NBF was made without obvious justification (i.e. no feasibility study was done; no experts were involved and according to unofficial evaluation the event was not successful over a period of 10 years).

Finally, it might be more appropriate to call this stage "the order-flow phase" to indicate the situation where an order, rather than a justified decision, flows from a senior authority to an inferior entity to be applied without sufficient justification.

5.2.2 Delivery phase

The Management Board first meeting commonly took place ten weeks before the opening date. Within this duration, the Management Board undertook the planning of the common five activities: financial study, event definition, logistics, HRM and marketing. A fixed budget is always received in advance. Over a period of 11 years, NBF expenditure average was 75,000 EGP. The expenditure was covered through two sources: RATPC (a predefined fund, averagely 50,000 EGP) and the Egyptian Association for Tourist Promotion (a predefined fixed fund of 25,000 EGP). All the festival activities are free so the financial study is confined to securing and managing the event expenditure.

> *24/06/2002: A letter from the Financial Department, Cairo Governorate informing that a 50,000 EGP are defined for the 2002 NBF.*
>
> *24/06/2002: A letter to the Egyptian Association for Tourist Promotion requesting the annual fund.*
>
> *29/06/2002: A letter from the Egyptian Association for Tourist Promotion ensuring that 25,000 EGP will be available for the NBF.*

A sample of the financial procedures includes:

9/7/2002: A letter to the Ministry of Defence inquiring about the cost of fireworks for 15 minutes, and asking for the usual 50% discount.

29/7/2002: A letter from the Ministry of Defence confirms their participation and determines the cost of the fireworks at 16,250 EGP after a 50% discount.

3/8/2002: A letter from the Cultural Regional Department informing that the total cost of the artistic performances will be 14,100 EGP.

7/8/2002: A letter to Cairo Governor informing that the total cost of the celebration will be 71,550 EGP, which is under the planned predefined budget (75,000 EGP).

The four other planning activities were then done in parallel. Despite, the event features (e.g. the event timing, location and activities) should be defined during the planning phase, they were notably subject of change during implementation (e.g. programme changing and activities cancellation). A sample of the event definition procedures includes:

2/7/2002: A letter to Cairo Governor suggested the celebration programme in detail; and suggesting the timing to be from the 1st to the 4th of September.

8/7/2002: A letter to the Ministry of Defence implores participating in the celebration by balloon shows, parachutes show for free.

26/8/2002: A letter to the Meriden Hotel notifies it to arrange for a dinner and a press conference at 26/8/2002 evening.

29/8/2002: An article in Sabah El-Kheir Magazine states that the wedding party (25 couples), which was planned to associate the event, has failed due to financial leakage, VIPs absence, disrespected promises and participants' fees.

2/9/2002: An official letter from RATPC directed to the Ministry of Defence informing them that the firework show, which they were asked to produce at the 4th of September, has been cancelled.

Logistics were entirely supplied by governmental entities with no major problems. Planning the logistics usually starts two weeks in advance; while supplying the venue with the required equipment often starts three days ahead and finishes usually on the opening day.

Marketing is confined to the promotional activities: street posters, free adverts in the official press (i.e. three newspapers), the Egyptian TV (i.e. nine channels), pamphlets, stickers and brochures. The promotional campaign started two weeks before the opening date.

> *18/8/2002: Cairo Governor announces for the press that the celebration date will be fixed through the following years.*
>
> *22/8/2002: Letters directed to hotels including the promotional posters.*
>
> *22/8/2002: RATPC sends 6000 stickers to the General Association for Public Transportation to hang them on the transportation vehicles, and 2500 to the Internal and Public Relations Departments to glue it up in Cairo streets.*
>
> *29/8/2002: Letters to the floating restaurants include the promotional posters.*
>
> *31/8/2002: A letter from the Egyptian Association for Tourist Promotion inquiring about the absence of the promotional materials from where they should be until the date.*
>
> *2/9/2002: A letter to the Egyptian Association for Tourist Promotion informing that the promotional materials have already been distributed.*

Regarding the human resources management, all the staff members participating in the NBF are permanent employees in the responsible body (i.e. the Regional Association for Tourist Promotion, Cairo).

Simultaneously, the board moved on to the implementation activities: dealing with contingencies, monitoring the implementation and shutdown. Obviously, there was no evidence of temporal distinction between both the planning and implementation phases as some planning procedures were undertaken during the event implementation perhaps due to the shortage of the time available for the planning phase. Thus, the two phases are usually merged into one delivery phase. Monitoring the event implementation concentrate on ensuring that the activities are running according to the settled plan. However, implementation was obviously a subject of several changes. Despite the absence of a risk management plan, organizers dealt with several contingencies mainly related to hazards against activities (e.g. key speakers absence). Finally, shutdown activities were conducted with no major problems. A sample of the procedures undertaken during the implementation phase were:

> *1/9/ 2002: A letter to Cairo Governor includes the names of the VIPs who are recommended to be invited to the shutdown party at the 4th of September.*
>
> *3/9/2002: A letter to Sheraton Hotel notifying it to arrange a tea party for the shutdown celebration at the 4th of September, and asking for the prices.*
>
> *3/9/2002: A letter directed to the ministry of defence announcing them that the Fireworks, which was planned to be in El Andalus Park, 4/9/2002, has been cancelled.*
>
> *5/9/2002: RATPC suggests a shutdown plan includes sending thanking letters to all the participants (members and corporations) and the suggested rewards for the flowers carts and the competitions winners.*

A comparison between the Welsh best practice model and the NBF model reveals that there is an obvious temporal interfering between the planning and implementation phases. This might be attributed to shortage in the time available for the planning activities, which started less than ten weeks ahead. This situation steered to shortage in the lead-time available for key activities, notably releasing the promotional materials.

5.2.3 Post-event phase

Archiving the event documents was the only post-event activity, which was then submitted to RAPTC for official storage. These documents include the correspondence between RATPC and all the other participating entities, and were mainly used for official practice and occasionally for determining: the board members and the services suppliers of the succeeding events. Thus, it could be remarked that:

- First, while a market research is always conducted toward the end of the implementation phase to provide reliable data for the evaluation phase, no market research was ever done in relation to the NBF.

- Second, despite the importance of outcome evaluation for defining reliably whether the event did or did not fulfil its aims and to provide justified improvements for the following event, no evidence of outcome evaluation existed in relation to NBF.

Accordingly, it can be claimed that the analysis of the NBF documents reveals a three-phase practical model (figure 5.1).

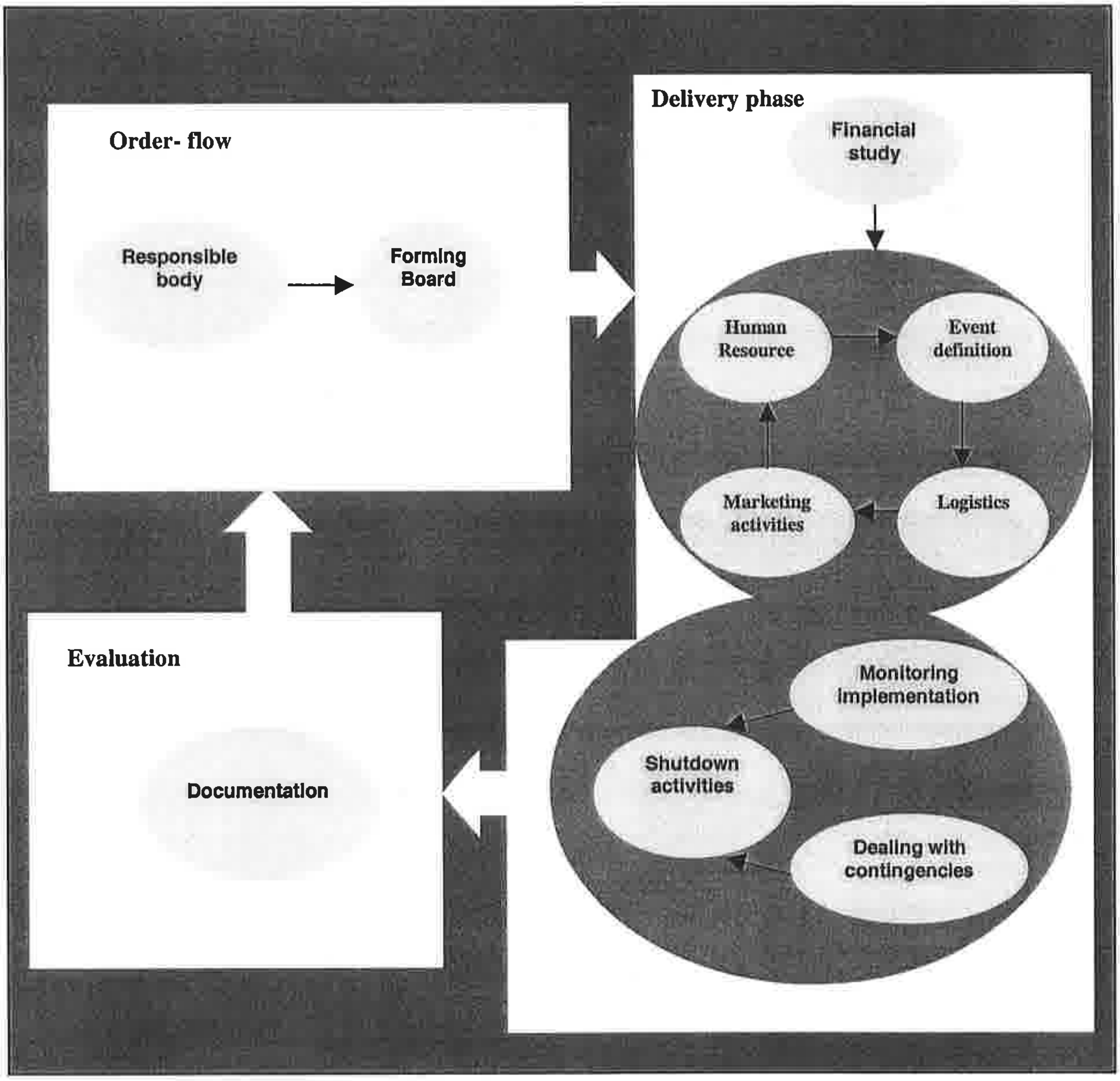

Figure 5.1 the NBF annual practical model

5.3 Case two– The Ismailia International Folklore Festival

Ismailia International Folklore Festival (IIFF) was examined by investigating the documents related to the event. IIFF documents were obtained from the Ministry of Culture (Cultural Palaces Association) and Ismailia Governorate (the Regional Association for Tourist Promotion, Ismailia). Data were culled from the documents related to IIFF 2002. The supplied documents demonstrate the IIFF programme, copies of press articles, dated official correspondence with the departments involved in organizing the festival and the participating entities. A significant percentage of the overall documents are correspondence with the participating artistic groups regarding transportation and accommodation arrangements. Documents were investigated inside the Cultural Palaces Department and Ismailia Governorate offices, with no restriction regarding the use of any document. Photocopying official documents is not allowed, according to the Egyptian Administrative Law, but written copying is fully accepted.

The idea of the festival was launched in 1985 when the National Folklore Department, Ministry of Culture (the catalyst), suggested organizing an international folklore festival (the idea), which comprises folklore dancing performances as a focal activity, besides street parades and performances (the initial definition), aiming to encouraging tourists to visit new destinations and to offer free entertainment to the Egyptian citizens (aims). The idea was then supported by Ismailia Governor who suggested hosting the festival in Ismailia City every August (the initial definition). Then both Ministry of Culture and Ismailia Governorate decided that the event would be organized through the Cultural Palaces Association, Ministry of Culture and the Regional Association for Tourist Promotion, Ismailia (the responsible bodies)[2]. Finally, a Management Board was formed mainly from employees from the two responsible entities to manage the IIFF.

[2] The festival was organized annually since 1985. In 1990, Ismailia Governor was discarded and consequently, the festival was cancelled till 1994. Then, in 1995, the Ministry of Culture revived the festival again.

5.3.1 Order-flow phase

The first year decision phase was not repeated similarly. The catalyst role ended after suggesting the idea. The idea and aims were not changed since the commencement of the event. Thus, the decision phase is now restricted to forming the Management Board by the responsible sharing two entities. The Board consists of 12 members, equally from three backgrounds: administration, tourism and folklore.

In this context, similarity existed between the order-flow phases in both NBF and IIFF. Typically, all the five remarks related to the order-flow phase, which were noted in the case of NBF, surfaced again in the case of IIFF:

- First, the absence of professionals.
- Second, the absence of SMART objectives.
- Third, the absence of initial financial study.
- Fourth, absence of initial forming for the event features.
- Fifth, the absence of justification for launching the event.

Again, it might be correct to call this stage "the order-flow phase" for the same previously mentioned reason.

5.3.2 Planning phase

Relying predominantly on the financial support of the Ministry of Culture (i.e. a predefined fixed fund of 600,000 EGP), the planning phase began with a financial study aiming to secure the potential fund required for establishing the festival (financial study). The monetary fund obtained from the Ministry of Culture is the event sole cash flow as IIFF is entirely a free-admission event whereas Ismailia Governorate usually provides in-kind supplies (e.g. theatres, free tours, catering). The fund is usually received seven months before the opening day.

16/2/2002: A letter to the financial department of the Ministry of Culture asking for the EGP 600,000 annual fund for the festival.

After receiving the fund approval from the Ministry of Culture, the Management Board moved directly to work on four parallel activities: forming the event features, marketing, HRM and logistics. Regarding the event definition, the festival activities (i.e. folklore dancing performances), location (i.e. 11 theatres in Ismailia city) and timing (i.e. a week to ten days during the second half of August) have been fixed for several years. Thus, most of the discussion focused on contacting the participating teams (25 teams) to confirm their participation and to arrange their transportation, accommodation, rehearsals and shows.

23/2/2002: Letters to the International Cultural Relations Department, Ministry of Culture and to the Egyptian Foreign Ministry require them to contact the suitable corporations (the Cultural Relations Departments in the Egyptian Embassies, the International Folklore Organizations) to contact the international entities to recommend folklore groups before the end of March.

3/3/2002 to 2/4/2002: Receiving the names of the candidate groups

4/4/2002: A letter to all the candidate teams includes data about the festival history, rules, time and location, and participation forms.

11/4/2002 to 14/7/2002: Receiving acceptances and rejections from the candidate groups.

17/4/2002 to 27/8/2002: Extensive correspondence with the hotels and transportation companies considering reserving rooms and coaches for all the participating teams.

Promotional materials were released four weeks ahead including posters and stickers, articles in the official newspapers (i.e. three newspapers), besides live broadcasting for both the opening and closing parties on the Egyptian TV. In addition, TV adverts were released three days before the opening, and continued through the festival week.

27/7/2002: Distributing the festival promotional materials to the hotels and the stickers to be glued to the transportation means.

21/8/2002 to 31/8/2002: Starting the media promotional campaign through free advertisements in the Egyptian TV (i.e. channels 1, 2 and 4).

Logistics includes providing the event venues (i.e. 11 theatres) with the equipment required, which is mostly supplied by governmental entities. Planning the logistics usually starts a month in advance; while supplying the venue with the required equipment often starts three weeks and finishes two days before the opening day.

> *21/7/2002: Planning an initial timetable for the festival in general, the performances, the domestic tours, and the groups' internal movements*
>
> *24/7/2002: Members from the Management Board move to check the theatres for defining any required decoration and equipment.*
>
> *5/8/2002 to 22/8/2002: Supplying the theatres with all the required equipment and decoration.*
>
> *20/8/2002 to 24/8/2002: Meeting the participating groups at Cairo International Airport and transporting them to Ismailia*
>
> *20/8/2002 to 31/8/2002: Rehearsals planning*

Human resource issues did not show any significance when planning the IIFF, due to the complete reliance on the permanent employees working for the participating governmental entities, which contributed to the event as a part of their typical official duties.

In this context, no major problems can be identified in relation to the IIFF planning phase.

5.3.3 Implementation phase

The event was implemented between the 24th and the 31st of August 2002. Complete similarity existed between the implementation phase in the Welsh best practice model and the IIFF where three tasks were conducted: monitoring the implementation, dealing with contingences and shutdown.

> *11/8/2002: A letter to the Heath Administration, Ismailia Governorate, concerning providing health services during the period between the 20th of August and the 31st of August*

18/8/2002: A letter to Ismailia Security Administration informs them the full details about the groups participating, the accommodation hotels, the transportation timetable, and the festival general schedule, asking the Security Administration to secure the festival and the participants

20/8/2002: Forming a team of three members to observe if all the activities are going according to the schedule.

1/9/2002 to 3/9/2002: Removing all the equipment from the theatres and storing them for the next year.

In addition, no managerial problems can be identified concerning the IIFF implementation phase.

5.3.4 Post-event Activities

Outcome evaluation is, again, completely neglected. The event culminated post-event phase in the collation of related documents, which was submitted to the organizing body and mainly used for official practice and occasionally for determining the board members, and the participating groups of the following editions. Thus, the same two remarks, emerged in the case of NBF, existed again the case of the IIFF.

- First, the absence of market research.
- Second, the absence of outcome evaluation.

Thus, the IIFF practical model comprises four stages (figure 5.2).

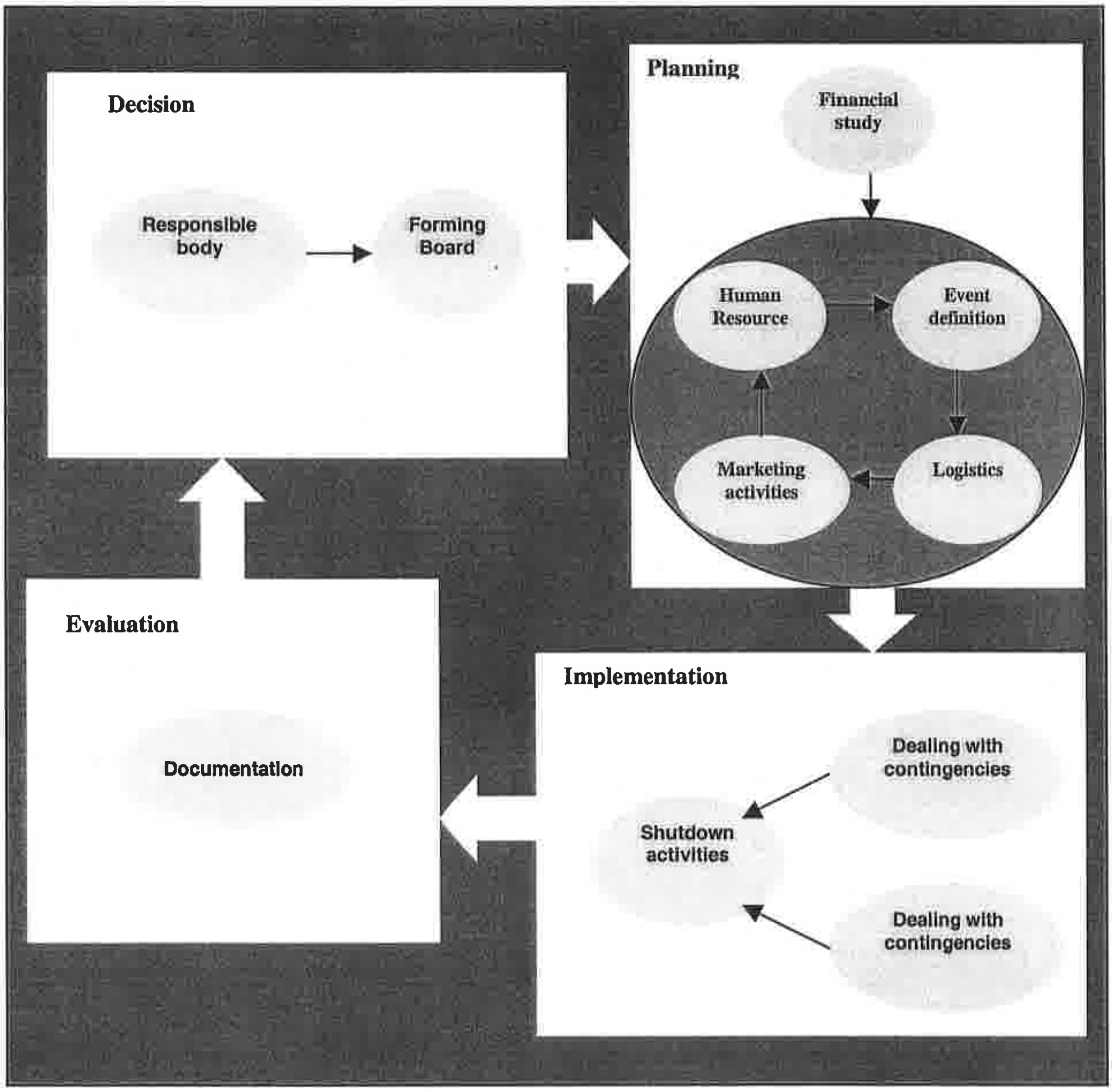

Figure 5.2 The IIFF practical annual model

5.4 Case three: Aida Opera Performances, Pyramids

The case of AOPP was examined by investigating the documents related to the event. All the documents were obtained from the Egyptian Opera House Association (EOHA), Ministry of Culture. Data were culled from the documents related to the 2002 AOPP. The investigated documents provided a wide range of details regarding the AOPP official correspondence with all the involved entities, which show in detail the managerial procedures of organizing the event, besides copies of the press articles on the AOPP. All the documents were investigated inside the EOHA offices (i.e. Planning and Executive Department), with no restrictions in accessing any document. Document photocopying is disallowed but written copying is fully accepted.

“Aida” is based on a story written by the Egyptologist August Mariette and composed by Verdi, inspired by the Pharaonic history at its height. The Opera was planned to be broadcast for the first time at the opening of Suez Canal July 1869; but by that date, it was not finished yet so it was first broadcast in the opening of the Egyptian Opera House at December 1871 (Hassan 2002). Afterwards, it became one of the famous opera performances all over the world. In 1987, the Ministry of Tourism (the catalyst) suggested reforming the traditional Aida Performance using the Egyptian monuments (e.g. the Pyramids, Luxor Temples) as an original background for the show (the idea), aiming to improve the Egyptian image as a secure tourist destination, promote Egypt as a cultural destination and achieve a financial profit or the even-break point at least (the aims). In order to get the best outcome, the Ministry of Tourism suggested funding the performance, which would be organized by the EOHA (the responsible body) that formed a Management Board consisted mainly of the EOHA employees to manage the event.

5.4.1 Decision phase

The first year decision phase was not repeated. The idea and aims were fixed. So, no discussion was required concerning them. However, the total authority was handed to the EOHA to manage the event annually[3], where a superior board including political key figures was formed about five months before the event with no managerial duties but providing political support to the event. On the other hand, an Executive Management Board was then formed five months before the opening date. The Board consists of ten members; eight of them are senior employees in different departments of the EOHA (e.g. marketing, financial, administrative, planning). The other two members are the AOPP director and a representative from the funding entity.

The Board primary tasks were, forming financial objectives (i.e. 100% ticket sales, distributed 70% sales for international tourists, 30% for Egyptian citizens), forming the event initial features, which led to conducting an initial financial study.

5/5/2002 (A Management Board meeting)

- *The initial aim is to achieve 70% international sales and 30% national sales.*
- *The event will be from the 10th to the 13th of October 2002*
- *Four performances will be broadcast on the Pyramids Open Air stage (8,400 sq meters;* 5200 seats*), which was built two years ago for broadcasting Aida 2000; equipment and decorations are required*

18/5/2002: An initial estimation for the costs from EOHA's point of view

22/5/2002: EOHA demands the funding entity to pay 500,000 EGP per performance (two millions EGP for the whole event).

28/5/2002: A letter from EMC implores a 20% discount off the costs of the performances (400,000 instead of 500,000 EGP per performance).

29/5/2002: EOHA accepts giving 10% discount so the cost will be 450,000 EGP per performance, and suggests a payment schedule.

1/6/2002: EMC accepts EOHA financial offer and the payment schedule.

5/6/2002: (A Management Board meeting)

- *A full initial estimation for the potential EOHA's expenditures*

[3] Despite being listed as an annual event, AOPP was actually organized on a random basis as it was broadcast only five times (i.e. 1994, 1997,1998, 1999, 2002) over a period of nine years (1994-2002), and has been cancelled four times for different reasons.

In this context, it could be noted that all the aspects of the decision phase in the Welsh best practice model were conducted, whilst, there was still an absence of special events professionals.

5.4.2 Planning phase

In similar fashion to the best practice model, the Management Board undertook five activities during the planning phase: event definition, financial study, HRM, marketing and logistics. No changes were suggested regarding the event initial features. Thus, the event was confirmed to be a four-day event, where four performances (the activity) would be broadcast between the 10th and the 13th of October 2002 (timing), where the event would take place on a temporary theatre at the Pyramids (the venue).

A final financial study was then conducted for defining the event budget. Then, a contract was signed (four months before the opening date) between EOHA and the funding company (El Mezalat Company) (EMC), according to which this later would provide the entire monetary fund (i.e. 1,800,000 EGP) and in return, they would obtain all the income generated from the event. The other major sponsors (e.g. Egypt Air; hotels) provided in-kind facilities and services (e.g. equipment, free accommodation, air tickets). A sample of the financial procedures includes:

> *6/6 and 7/6/2002: Meetings between the Board and the EMC to discuss the event overall potential income and expenditure in detail, preparing to signing the funding contract.*
>
> *8/6/2002: Signing the contract between EOHA and EMC. The contract includes: An introduction, the commitments of each side, the financial agreement, the cancellation penalties, and the legal conditions. The contract informs that the relation between EOHA and EMC is a partnership relation and the both sides will associate in planning and executing the event.*

Due to the negotiation between the EOH and EMC, regarding the event potential financial situation in relation to the number and features of the performances, the event definition and the financial study formed an iterative cycle during the AOPP planning, which took place earlier than the other three planning activities (i.e. marketing, HRM and logistics), which took place simultaneously.

A staff members' structure was designed three months before the opening day including 14 committees. The structure also included a precise description of the tasks and members of each committee. The event structures included mainly employees from the EOHA. Part-time staff members were appointed more than a month before the event, where their duty was mainly related to on-site tasks (e.g. ushering; food and beverage and merchandizes sales). A sample of the procedures related to the HRM includes:

10/6/2002 (A Management Board meeting)

- *Temporary staff members will be hired starting from the 1st of September until the 15th of October.*

28/8/2002: Contracts with the temporary staff members

1/9/2002: 40 part-time staff members receiving the jobs; a part-time worker contract was signed for 45 days to be ended at the 15th of October 2002.

The event promotional plan was planned to start three months before the opening day including, posters, brochures, press releases in the official newspapers, free and discounted adverts on the Egyptian TV, that is beside a sales promotional campaign directed to the Egyptian travel agencies aiming to utilize them as a tool for attracting the international attendants (i.e. travel agencies were offered 10% commission). However, most of the promotional activities took place a long time after what was planned (e.g. adverts were not released until a month ahead). Prestigious pricing technique was adopted depending on the value of both the activity, location and the features of the potential attendants whether local or international. A mixed distribution plan was applied depending on using both the EOHA and the Egyptian travel agencies as distribution channels. A sample of the marketing procedures includes:

10/6/2002 (A Management Board meeting)

- *The promotional plan includes 6 TV advertisements daily, roads advertisements, posters, brochures, and pamphlets.*
- *EOHA requires 10% of the tickets to be distributed as free invitations; EMC accept 250 tickets for each performance*
- *The performance will be televised, and then printed on CDs.*

11/7/2002: A letter from Estmar Travel Agency asking about the seriousness of organizing Aida this year; beside questions about the ticket prices and the travel agencies commission.

13/7/2002: A confirmation of the seriousness of organizing Aida this year; concerning ticket pricing and commission, travel agencies should contact EMC.

15/7/2002: A letter from EMC defining 10% to 20% commission for the travel agencies depending on the number of sold ticket. A cancellation fee between 50 to 100% depending on the timing of cancellation.

21/7/2002: A press conference for the representatives of the Egyptian press, media, and travel agencies to release details about AOPP 2002.

19/8/2002 (A memo of the Coordination Committee)

- *Until the 19th of August 2002, the reservation percentage is 34%, which is low. The reasons from EMC's viewpoint are: first, the cancellation of the last two years performances, which built up an image of distrust. Second, the travel agencies did not present any special offers (i.e. the event, accommodation, air tickets and tours). The suggested solutions are: first, opening more distribution points. Second, applying an intensive promotional programme nationally and internationally. Third, sending a letter to the Minister of Media imploring for extra free adverts in the Egyptian TV. Fourth, sending a letter to Cairo Governor implores using the light stands free for advertising. Fifth, designing a site on the Internet.*

20/8/2002 (A memo of the Coordination Committee)

- *The distribution points have not been opened yet, as the tickets have not been printed yet.* [The 34% reservation was done through direct sale].
- *The posters have not been published yet.*

3/9/2002 (A Management Board meeting)

- *The distribution points for public have not been opened yet; as there is no site-plan for the seating area.*

10/9/2002 (A Management Board meeting)

- *There are no advertisements in the media about the event until now.*

Regarding logistics, a complicated plan was settled for supplying all the equipment required. Supplying the venue with the equipment started two months and ended 12 days before the opening day. A sample of the procedures related to the logistics includes:

5/8/2002: (Management Board meeting)

- *A letter sent to the Head of the Superior Council for Egyptian Monuments to permit workers entering the location starting from the 15th of August 2002*
- *Naming the company, which will manage the parking area.*
- *20 shuttle buses will be ready to transfer the workers between EOHA and the location starting from the 15th of August*
- *New uniform will be bought for the staff members in the location*

6/8/2002: A list of all the electrical equipment required to be sent to the Ministry of Electricity to estimate the costs required.

10/8/2002: A letter directed to the Superior Council for Egyptian Monuments asking for permission to transport the required equipment to the location starting from the 15th of August

15/8/2002: Workers and equipment start entering the location

19/8/2002 (A memo of the Coordination Committee)

- *A deal has been made with the Ministry of Defence for constructing the spectators' seating area. Finishing the construction will delay from the 15th to the 25th of September. The follow-up committee will visit the location at the 20th of August to determine the spectator's seating area location.*
- *A list of the features, types and numbers of the equipment required.*
- *The attendants' gates and the VIPs' gates have been determined.*
- *A suggestion for signing a contract with a cleaning services company.*

20/8/2002 (A memo of the Coordination Committee)

- *A suggestion for building 10 toilets for every 500 attendants*
- *The stage equipment should be ready by the 24th of August to be tested.*
- *A letter should be sent to the Pyramids Sound and Lights Co. alarms not to lighten the pyramids from the 24th to the 27th of August, as the AOPP lighting system will be tested at that time.*
- *Telephone lines are required in the location.*

2/9/2002: A letter from EMC demonstrates the attendees' transportation plan.

28/9/2002: Work is 100% finished in the location, which is ready for the private show for the Dentists International Conference at the 1st of October 2002

In this context, it can be remarked that:

- First, while in the best practice model the financial study precedes all the other four planning activities, the financial study forms an iterative cycle with the event definition in the AOPP model.

- Second, the AOPP planning started six months ahead, which gave enough time for the planning activities to be completed 12 days before the opening day. Yet, promotional activities were delayed (e.g. despite being planned to start three months ahead, the international promotional activities started ten weeks ahead, and the local promotional activities started actually less than a month ahead).

5.4.3 Implementation

The implementation phase similarly included the three steps identified in the Welsh best practice model: monitoring implementation, dealing with contingencies and shutdown activities. A sample of the procedures related to this phase includes:

> *10/8/2002: A contingencies plan for fire fighting was designed and distributed for the responsible staff members.*
>
> *12/8/2002: A letter to Giza Governorate informing about the event implementation plan and asking for a plan for a health services during the event.*
>
> *18/9/2002: A letter to the Giza security asking about the security plan during the event.*
>
> *14-19/10/2002: shutdown activities.*

5.4.4 Post-event phase

A financial evaluation was conducted at the end of the event. However, no other evaluation activities were conducted. All the documents resulting from the event were collated for official usage, mainly related to the official accountability. Thus, it could be claimed that the one of the two remarks emerged in both NBF and IIFF existed again with the AOPP, which is: the absence of market research. Thus, analysis of AOPP reveals a four-phase practical model (figure 5.3).

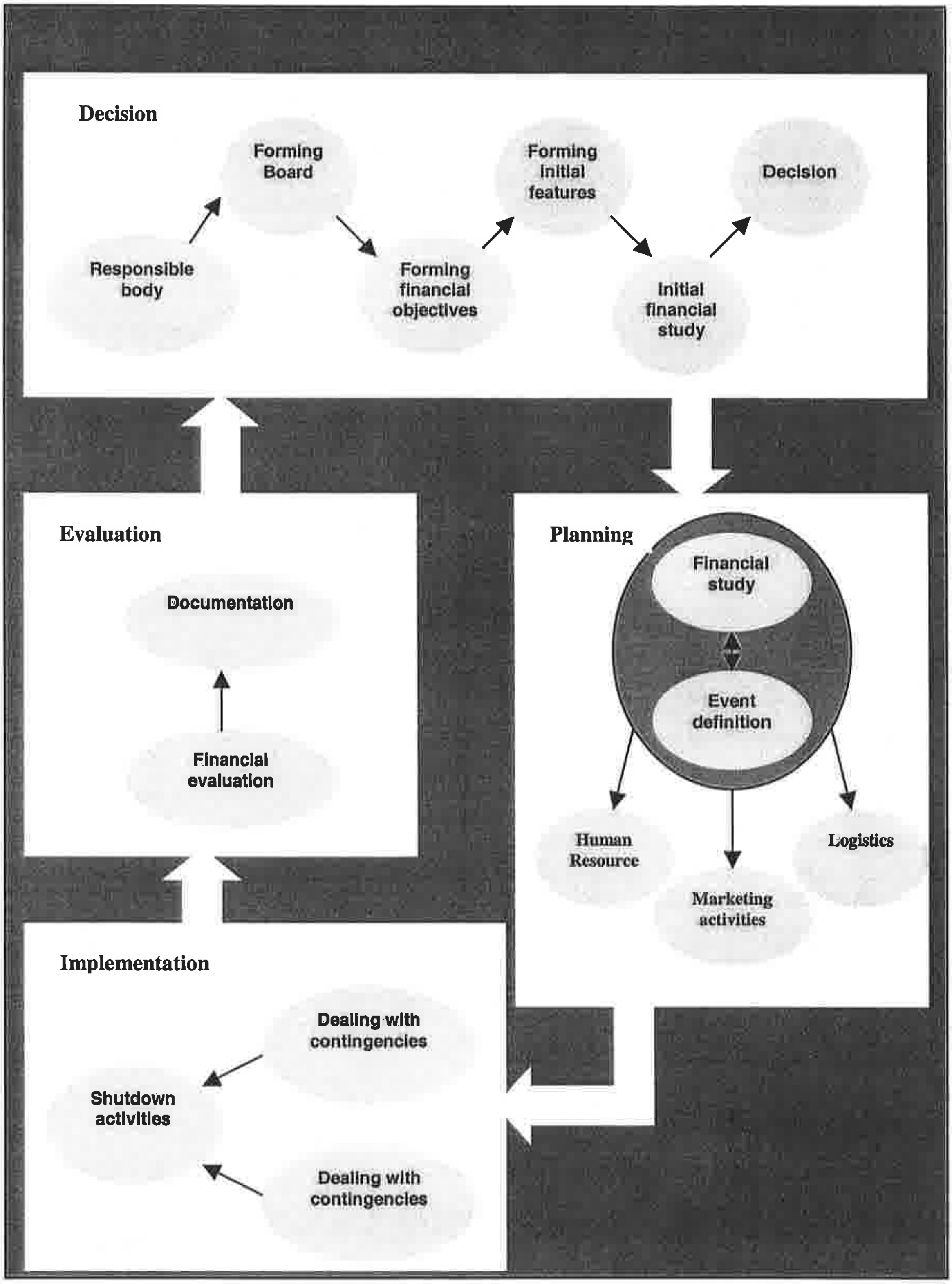

Figure 5.3 The AOPP annual practical model

5.5 Identifying the Egyptian events' managerial problems

Comparing the Egyptian models against the Welsh best practice model revealed the existence of eight dissimilarities, which were discussed with the Egyptian practitioners, through semi-structured interviews, to identify whether they represent actual managerial problems to which the failure of some of the Egyptian events can be attributed. In the case of NBF, the interview was conducted with the Manager of the Festivals and Local Tourism Department in the Egyptian General Association for Tourist Promotion, who is a supervisor of the NBF (NBF-S). In the case of IIFF, the interview was done with the Manager of Ismailia Regional Association for Tourist Promotion, who is operating, as well, as an Executive Manager for the IIFF since 1999 (IIFF-EM). Finally in the case of AOPP, the interview was conducted with the Manager of the Planning Department in the Egyptian Opera House, who has been working as a Coordinator (AOPP-C) between the executive committees working on AOPP 2002. All the interviews took place in the interviewees' offices, where the interviewees were asked to identify whether the dissimilarities should be considered actual problems to which the failure of some of the Egyptian events can be attributed.

5.5.1 Lack of special events management professionals

Despite the worldwide growth in the number of books, journals, conferences and research entirely dedicated to special events, which indicates an escalating trend toward nominating "special events" as an independent professional area, analysing the Egyptian cases illustrates the total absence of special events professionals in managing the Egyptian events and shows obvious domination of the governmental employees coming from administration, security, tourism and arts backgrounds.

Despite believing in the importance of the special events professionals particularly for enriching the events with new ideas and systemizing the events managerial procedures, the Egyptian organizers claim that their absence can hardly be considered a problem to which the failure of some of the Egyptian cultural events can be attributed. The Egyptian organizers deem that members with practical experience, from superior governmental entities and consultants in particular areas notably marketing and market research could be more important.

> *Of course, professionals are important; they can suggest new ideas or put the systems for managing the events...I really cannot say that this is a reason because we have some successful events, which are completely managed by people who are not professionals...we have persons with some experience and I think they can manage the Egyptian events successfully if we give them enough money and time to manage the event and if they know that at the end they will be questioned about the results of the event.*
>
> NBF-S

> *The organizing committee members include about 15 members...the governor and the managers of the related departments...like, the financial, the tourism, the information, the legal and the administrative departments in the governorate besides a representative from the Ministry of Culture...most of the committee members are official employees in the governorate and most of them have been participating in organizing the festival since it restarted in 1999...I do not think we will need professionals, if we need professionals, I think we need someone to do good market research...as I said, we do not have enough information and we could not do good evaluation, so maybe a professional researcher is what we need.*
>
> IIFF-EM

> *They* [the board members] *have good knowledge about organizing events...I do not mean in Aida but, you know, the Opera House hosts a lot of events, this is what I mean, some of them have been here for 10 years or more...I think this is much more important than professionalism.*
>
> AOPP-C

5.5.2 Absence of SMART objectives

Special event aims express generally what are expected to be achieved but they do not provide any measurable details. Thus, the event aims are usefully broken down into "SMART objectives", which should inspire the event planning and work as a criterion against which the event outcome evaluation should be measured.

The Egyptian organizers claim that the absence of SMART objectives is a key factor, to which the failure of some of the Egyptian cultural events can be attributed.

> *We actually do not have that sort of precise targets now; but for an ideal model, we should have some more obvious targets from the beginning...yes, I really think this is a problem...because, we are not sure of what we should do or work to achieve.*
>
> NBF-S

> *We know what the festival is made for...we aim to provide free entertainment to the Egyptian citizens besides attracting more tourists to the governorate...no, we do not have any specific aims, if you are talking about specific numbers of visitors; we did not estimate the visitors' number.*
>
> IIFF-EM

However, absence of SMART objectives is thought to contribute to the absence of evaluation, which negatively affects the possibility of both solving the events managerial problems and improving the succeeding events.

> *One thing leads to another, if we do not have well-defined aims how could we measure whether the festival is successful or not...we can depend on the general aims to do the evaluation, but I do not think this will give accurate indications.*
>
> NBF-S

In the same context, the interviewees record that besides the absence of the SMART objectives, the general aims are, as well, undefined clearly or firmly.

> *I think we did not do a lot of effort even to define our general aims. I am not sure if we are aiming to attract new tourists to Egypt or to offer a new tourist attraction for those who are already in Egypt by the festival time.*
>
> NBF-S

The interviewees assert that the indistinctness of the general aims could be a vital reason for the lack of staff motivation.

> *Some more details concerning the aims will be very useful in different ways...If we can give the staff some more defined aims to achieve, this will motivate them to do some more efforts...some of them* [the staff members] *are not doing enough because they consider the festival successful because the citizens are usually crowded to watch the performances; but this is not all what we should do. We need to attract tourists as well...so, if we can tell them that we have these so and so aims and to say we are successful we need to achieve them, they will understand what we really want to do.*
>
> IIFF-EM

Finally, the AOPP was the only case, which has a clear set of objectives.

> *We had some objectives. We aimed to sell 100% of the total seats capacity for all the performances, and to sell 70% at least of the whole capacity to international tourists.*
>
> AOPP-C

5.5.3 Absence of initial financial study

An initial financial study is required to check that the event is financially feasible; and it does not need detailed answers; indications of likely income and expenditure is sufficient. For a small event the initial financial study may be relatively informal and may just be a *"chat with a colleague"'* (Watt 1998, p.8); but for larger events *"it requires investigating the project potential budget relying on the results of a market research to provide efficient database for facilitating and justifying the decision-making"* (Salem 1998, p.21). Analysing the Egyptian cases revealed that initial financial study existed only in AOPP. From the Egyptian organizers' viewpoint, the absence of initial financial study is a reason to which the failure of some of the cultural special events in Egypt can be attributed as it increases the possibility of financial loss due to starting the planning phase without sufficient data on the potential financial situation.

> *As I said before, we always receive fixed budget for the NBF...we do not do initial financial study, because if you do not have precise aims to explore their achievability, you do not have any idea about the potential demand, and you can not determine the amount of money you get, then why and how would you do an initial financial study...but if we are speaking about an ideal situation in Egypt, then we should define the activities then doing the required studies to know how much we need and whether the festival is going to give us the outputs, which worth what we are going to pay or not; then to decide if we should go on.*
>
> NBF-S

> *No initial financial study was made before the festival, but this was absolutely wrong...if I am putting a model, I will consider all the parts you mentioned here, including the initial financial study...absence of initial financial studies could be a reason as then we are starting the planning without real knowledge about the financial situation; money shortage could be a possible reason for the failure of any festival...I could not say it is the only reason, but I can say it is one of a group of other factors.*
>
> IIFF-EM

5.5.4 Unjustified decision-making regarding event launching

Numerous decisions should be made throughout the event life regarding almost everything (e.g. the event features, pricing, logistics, promotion). Yet, one of the key decisions in the event life is this made at the end of the decision phase where a decision is made to define whether the event should or should not be launched. Ideally, this decision should be justified. The sort of required justification differentiates from a new event to a recurring event. For a new event, the indications of potential success or failure supplied by the feasibility study (i.e. market research associated with initial financial study) during the decision phase can provide a professional justification for the decision-making. For a recurring event, the success or the failure of the previous event is likely to be a major justification for continuing or terminating the following event. In addition, the market research conducted at the end of the implementation phase, could also be used. Investigating the Egyptian cases revealed that none of the investigated events could provide any of the above-mentioned justifications.

The Egyptian organizers assume that the Egyptian events are mostly launched relaying on governmental unjustified orders rather than justified decisions. On one hand, the Egyptian organizers claimed that the absence of feasibility study, which leads to the absence of reliable data, hinders the possibility of providing any logic justifications for launching any new Egyptian event. On another hand, the absence of outcome evaluation, which leads to the absence of reliable conclusion on the failure or the success of the previous events, boosts the difficulty of providing justification for the recurring events.

> *Again one thing affects the other, as far we do not do initial financial study and have no data about the potential segments we cannot say we are making justified decisions…for me, it looks like a net; clear aims, activities facilitate achieving these aims, market research to know what are the potential segments' reaction toward your idea, then a financial study to conclude your potential budget before making a decision. If you do not do any of them then you cannot really say you are making a good decision.*
>
> NBF-S

> *I do not think the continuity or the termination of the festival is that much related to whether it is successful or not.*
>
> IIFF-EM

> *Financially, I cannot justify the event if we are speaking about official accountability, as the event likely achieves financial loss...we can make a justified decision if there is a study shows that non-financial benefits are likely to be achieved, or if the event has a history of success built on a reasonable post-event evaluation.*
>
> AOPP-C

Finally, the IIFF-EM records that the Governor is the person who decides launching or terminating the event.

> *The Governor is the one who makes any superior decisions related to the festival; we annually ask for his permission to launch the festival, he then gets the permission from the Ministers' Board.*
>
> IIFF-EM

5.5.5 Insufficient lead-time for planning activities, notably promotion

Planning is the time-consuming phase. While event implementation usually takes few days or at most weeks, the event planning commonly takes months or even years. Investigating the documents related to the NBF revealed that the first planning activity took place three months ahead. However, this led to the disappearance of the temporal distinction between the planning and implementation phases due to the shortage of the time available for the planning activities. The planning of both IIFF and AOPP started six to seven months ahead, giving sufficient lead-time for most of the planning activities to be completed on time, nevertheless most of the promotional activities were behind the plan.

While the NBF organizers complained clearly about the negative effect of the short time of planning, the organizers of both IIFF and AOPP claimed that the time-scale they are allowed is sufficient but more time is required especially for promotion. The interviewees suggest that planning should ideally range between six months and a year depending on the nature of the organizing entity (i.e. full-time or part-time), the volume of work required (i.e. the event size) and the features of the target market (i.e. local or international).

> *Our real problem is that we do not have enough time for the planning, especially the promotion and we rarely do evaluation…it is absolutely difficult to organize the festival within one or even three months; for running this festival efficiently we, at least, need six months.*
>
> NBF-S

> *We usually start contacting the participants six months before the festival, but we start working another couple of months before that…this is enough for our work; I do not think we have any problem with that…for the festival, I think six to nine months is an ideal duration for our festival.*
>
> IIFF-EM

> *I think we are doing good concerning time but speaking about a big event like Aida, a year will be more suitable for doing all the work.*
>
> AOPP-C

Regarding the promotion, the Egyptian organizers believe that delaying the promotional activities is a vital element for failure, notably for the international segments. Thus, the promotional activities for international market should start on average three to six months ahead, whereas two to three weeks are sufficient for local citizens.

> *The marketing should start as soon as we receive the fund…I believe that international tourists need longer time to be persuaded...this could be six months…at least three months. They need time to plan their trips, especially when they are going outside Europe…if we are talking about the Egyptian market, it will be between two and three weeks for marketing…yes, as we can not promote the festival, this is a problem.*
>
> NBF-S

> *We do very little marketing inside Egypt because the festival is free…*[in the case of the international tourists] *we depend on the participating teams to do the marketing for us outside and we also depend on the families or the friends who come with the participants so we do not do a lot…Three months is enough for international tourists…but I think the main factor will be the cost of such campaign…we do not do long-term marketing for the local citizens…a week or two will be good.*
>
> IIFF-EM

> *Yes, I think it is an important problem, especially if tourists are your main target…six months will be quite enough for an ideal international campaign…four months* [is the minimum].
>
> AOPP-C

5.5.6 Absence of market research

Market research is vital for special events (whether it is done during the decision phase or at the end of the implementation phase), as it provides a good base for all the event related decision-making. The investigation of the Egyptian cases revealed that no market research was conducted whether during the decision or at the end of the implementation phases. This leads to the absence of reliable data, which could contribute to a series of unjustified decisions regarding issues like promotion and pricing; besides designing events that are incompatible with the needs of the potential segments.

> *We did not do any market research before approving the idea...we should do some research before any new idea, especially we always work on attracting international tourists...I think using the same festival for attracting tourists from different countries like Germany, France, Italy and UK, requires to know a lot of data about these markets so you can offer a mix of activities that is able to attract all of them otherwise you are relying on luck.*
>
> NBF-S

> *No; we do not do market research before or during the festival...Ideally, yes sure I agree that we should do all these parts...especially the market research, we need information...about almost everything related; our customers, the new markets that we can attract, our competitors...about the sponsors who can potentially fund the festival, because we need more funds now...information before any new event is very important and shortage in information makes our work very, very difficult...of course, absence of enough information could be a reason for the failure...we are designing a festival for persons who we know very little about, we can design much better festival if we know more about them.*
>
> IIFF-EM

The Egyptian organizers state that conducting a pre-event market research on an international scale is difficult due to the expected high cost. Thus, market research could be directed to the travel agencies and the experienced staff members to provide data. Such research could be used as a base, and then market research should be done regularly after each event for providing regular improvements for each following event.

> *Gathering information about the potential participants is very important; unfortunately we did not do any market research before Aida 2002, before planning the following one, we will look for more information...from sources*

such as the travel agencies, which organized the tours for those tourists who attended Aida 2002, and from the staff who participated in organizing Aida 2002...we can not do an international market research now, because we have tourists from different countries and this will cost us a lot of money which we can use in some thing else more useful...yes, I agree with that. We can ask them later on when they are here.

AOPP-C

5.5.7 Absence of outcome evaluation

"Outcome evaluation" is always conducted after the event implementation, aiming to define whether the event did fulfil its projected objectives or not and to suggest improvements for the succeeding events. Although the detailed documentation of the Egyptian events offers functional database to efficient evaluation, there is little evidence of evaluation that existed only in the AOPP case and was confined to an assessment of the event financial outcome.

The Egyptian organizers claim that absence of evaluation is a logic conclusion for the other managerial problems, notably the absence of "SMART objectives", which should provide the criterion against which the event actual outcome should be measured. At the same time, the Egyptian organizers believe that absence of evaluation hinders both defining professionally whether or not the event fulfilled its aims and exploring the event's drawbacks, which lead to an inevitable absence of providing justified improvements for the following events.

We rarely do evaluation...if you did not evaluate the festival then you would never know what were your mistakes then you could hardly suggest useful development for the following festival.

NBF-S

[Do you do evaluation?] *Not really; recently we tried asking our guests to give us some feedback about their thoughts about the festival, but honestly we did not get anything useful yet...it could be because we did not plan well for it or because the visitors did not take it seriously.*

IIFF-EM

Yes, we evaluate our financial outcome...we do not evaluate the benefits, which the Egyptian community gain...I absolutely believe this is wrong because, this is supposed to be our aim. I really do not know if this has been achieved or not. We even are not sure whether Aida 2002 was for or against the Egyptian community sake...sure, we need to do more and more *evaluation, and I am speaking compared to the quality and the volume of the evaluation we are doing now.*

AOPP-C

5.5.8 Absence of written model of good practice in event management

The above-mentioned absence of the special events' professionals, the impermanent nature of the organizing boards and the absence of outcome evaluation could jointly contribute to the absence of a written model of good practice in event management in Egypt. However, the Egyptian organizers are not sure if the absence of a written model could be considered a problem. While the organizers of the NBF and AOPP deemed that it can hardly be a problem; the IIFF-EM records that a written model is preferable.

As a governmental entity, we should keep documents of all what we are doing; and these documents are mainly used for the official accountability, especially the financial procedures and the festival total costs...we do not have a written model for the organizational procedures of managing our festival, but I think the documents we have can help us to build such model, the way you do...no, I do not think the absence of a model can be a real reason for the festival failure...I think, it is all about the experience more than having it written, if you know it well and can do it well, I think this will be enough.

NBF-S

We have been organizing the festival for years without knowing if what we are doing is the right way or not...we are depending on the organizers to define what to do every year but who could say this is the best way to do the festival; it could be average or good but for sure I can see it is not the best, we need someone to tell us...it will be preferable if we have an ideal model to learn from...if I have a best practice model, then I can compare it to what I am doing to find out where my mistakes are, then it will be easy to give solutions for these mistakes;

IIFF-EM

It might not be as serious as the other problems, which we spoke about; we usually have no written models for any of our procedures, even for our daily routine work. You cannot go to an employee asking him if he has a written model for what he is doing.

AOPP-C

5.6 Conclusion

Interviewing the Egyptian practitioners showed that out of the eight dissimilarities, which revealed from the comparison between the Welsh best practice model and the Egyptian three practical models, six dissimilarities could definitely be considered actual problems to which the failure of some of the Egyptian cultural events can be attributed. Those problems are: first, the absence of SMART objectives; second, the absence of initial financial study; third, the absence of justified decision-making concerning launching the event; fourth, the insufficient time for planning activities, notably promotion; fifth, the absence of market research; and finally, the absence of outcome evaluation. On the other hand, the Egyptian practitioners believe that the lack of special events management professionals and the absence of a written model of good practice for special events management can hardly be considered actual problems.

In this regard, obvious links could easily be observed between the Egyptian six managerial problems. For example, the absence of SMART objectives, the absence of initial financial study and the absence of outcome evaluation all jointly contribute to the absence of justified decisions; as well, the absence of SMART objectives contributes to the absence of outcome evaluation.

> *One thing affects the other...for me, it looks like a net...if you do not do any of them then you cannot really say you are making a good decision.*
>
> NBF-S

Figure 5.4 illustrates the relations between the Egyptian six managerial problems.

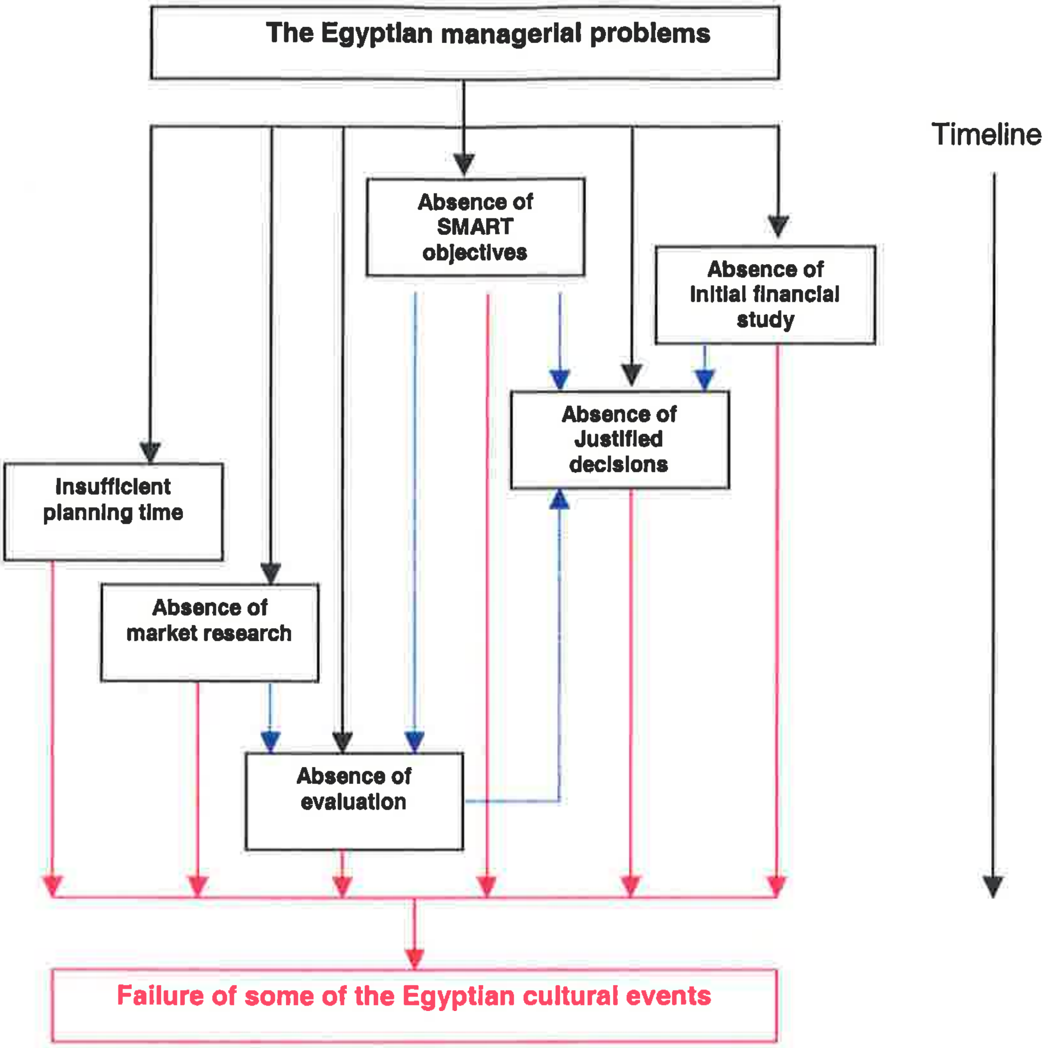

Figure 5.4 the relations between the Egyptian six managerial problems.

Thus, besides the necessity of a generic best practice model for managing cultural special events in an Egyptian context (chapter six), a best practice guide for managing each of these six problems is required, as well, to contribute to the effective management of these managerial areas (chapter seven).

5.7 Summary

This chapter describes a multiple case study of three Egyptian cultural special events (Nile Bounty Festival, Ismailia International Folklore Festival and Aida Opera Performances, Pyramids). The three cases were examined through detailed investigation of the documents related to each event, which facilitated the development of three practical models for managing cultural special events in an Egyptian context. The three Egyptian models were then compared against the Welsh best practice model concluded from the examination of three relevant Welsh cases. The comparison revealed eight dissimilarities, which were then discussed, through semi-structured interviews, with senior members of the management boards of the three Egyptian events, aiming to identify whether these eight dissimilarities represent actual problems to which the failure of some of the Egyptian events can be attributed or not. The interviews resulted in minimizing the potential eight managerial problems into six problems. Consequently, a best practice model for managing cultural special events in an Egyptian context and a best practice guide for managing the six problematic areas are required.

Chapter six

Adapting the Welsh best practice model to an Egyptian context

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6.4	Case three: Aida Opera Performances at the Pyramids	6.10
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6.1 Introduction

This chapter describes the third phase of the fieldwork where the suggested Welsh best practice model, which emerged from investigating the Welsh cases (the fourth chapter), was reviewed by the organizers of the pre-selected three Egyptian events aiming to produce a potentially applicable model for managing cultural special events in an Egyptian context. In the case of the NBF, the interview was conducted with the Manager of the Festivals and Local Tourism Department in the Egyptian General Association for Tourist Promotion, which organizes the NBF through its regional office in Cairo. In the case of the IIFF, the interview was carried out with the Manager of El-Ismailia Regional Association for Tourist Promotion, who is operating, as well, as an Executive Manager for the IIFF since 1999. Finally in the case of the AOPP, the interview was conducted with the Manager of the Planning Department in the Egyptian Opera House, who has been working as a Coordinator between the organizing committees working on AOPP 2002. All the interviews took place in the interviewees' offices. The interviewees were provided with a copy of the Welsh best practice model, which was used as a projective instrument to stimulate the interviewees to comment on the suggested Welsh model and to propose what they think to be necessary modifications, if any, with the aim of developing a potentially applicable model for managing cultural special events in an Egyptian context.

6.2 Case one: Nile Bounty Festival (NBF)

NBF was examined by interviewing the Manager of the Festivals and Local Tourism Department in the Egyptian General Association for Tourist Promotion, which organizes the Nile Bounty Festival through its Regional Office in Cairo. The interviewee supervises all the special events organized by the Regional Office in Cairo including the NBF.

Similar to the suggested Welsh model, the NBF Supervisor (NBF-S) believes that the managerial procedures for organizing the Egyptian cultural special events should go through all the four suggested phases: decision, planning, implementation and outcome evaluation.

> *Yes, I think these four areas reflect generally what should happen when organizing the NBF.*

Regarding the annual decision phase, the NBF-S concurs with all the five areas involved in this phase. Nevertheless, unlike the suggested Welsh model, the NBF-S records that in an Egyptian context two modifications should be done: first, the catalyst role does not terminate but changes by the end of the first event.

> *It could not be that way in Egypt, because what you call a "catalyst" is not an individual in most of the cases. It is usually a governmental entity; its role may change but not vanish. In the NBF for example, the Ministry of Tourism first provided the idea of reviving the old tradition and a group of aims. Then it did not vanish, but it annually participates in forming the board; monitors the event and theoretically asks for the outputs but we are actually do not do enough evaluation.*

Consequently, the NBF-S states that the role of the responsible body should be referred to in any suggested model.

> *If you compare this model* [the Welsh model] *to our model* [the NBF model] *you will find that our model refers to the role of our office in Cairo* [the responsible body], *which officially manages the event. I think we cannot ignore this office in any suggested model.*

Second, NBF-S notifies that the volume of activities should be the main factor when estimating the event budget; otherwise fulfilling the event aims would be highly improbable.

> *We usually have a predefined budget for each festival, but this usually limits what we should do…it usually happens to cancel activities due to cash shortage…you cannot ask me to succeed without supplying me with enough money to do what success requires.*

Finally, the NBF-S focuses on the importance of the SMART objectives. In this regard, the NBF-S records that despite the fact that the NBF started without specific aims, the catalyst should ideally be more precise regarding the aims, especially in case of receiving governmental fund, which usually leads to stiff accountability.

> *In an ideal model, we should have some more obvious targets from the beginning, at least we can start with modest targets...we are a governmental entity, you understand what I mean, so we should always be ready to answer questions about money and why we spent it on so and so…if I put myself in their shoes* [his managers], *the first question I will ask is how much did you spend, what were your targets and what did you achieve, then I will need to have accurate answers with figures.* [So how do you answer them now without figures?] *I am not answering because we rarely do evaluation. They are happy as far as I do not exceed the budget.*

Similar to the Welsh model, NBF-S coincides with splitting the planning phase into five areas (i.e. event definition, financial study, HRM, marketing activities and logistics) and with the influence of the financial study on the other four areas.

> *Yes, I agree with the planning areas like that.* [But you said in the decision phase that forming the initial features should ideally precede the initial financial study, so do not you think it should be the same during the planning phase]. *No, I do not think so. What I mean is that, by the decision making time, we should define the activities first, then estimating the money we need, then by the planning time we would know our budget which we should not exceed…I am not against fixed budget, but I am against defining the budget before knowing, even roughly, what we are going to do. Then having a budget, you should do your best not to exceed it…Anyway, I can not go to my manager asking for an open budget; this is absolutely unacceptable in a governmental entity…but I can go to him saying we want to do these activities during this year festival in order to achieve these aims and the budget will be about 100,000 EGP, can I have this budget? If yes, then during the planning I have to manage the planning activities…within this budget.*

Despite the NBF-S points out that the organizers do not conduct firm or well-planned monitoring for the implementation, the NBF-S agrees with the three activities suggested in the implementation phase of the Welsh best practice model.

> *We do not do very well planed monitoring for the implementation, but I think we should do all the three areas…I agree with them, I know we are not doing this in the most perfect way.*

As well, the NBF-S concurs with the importance of the evaluation phase, despite the fact that evaluation is rarely conducted, which repetitively leads to shortage in the improvements presented to the next event. However, market research seems to be a critical step for achieving efficient evaluation, especially when assessing the customers' satisfaction.

> *The two areas* [the evaluation activities] *are important…we rarely give suggestions for the following festival…yes, yes, sure there is a relation between shortage in evaluation and shortage in the suggested improvements…market research is very important. If we want to know what the customers think about the festival then we should ask them.*

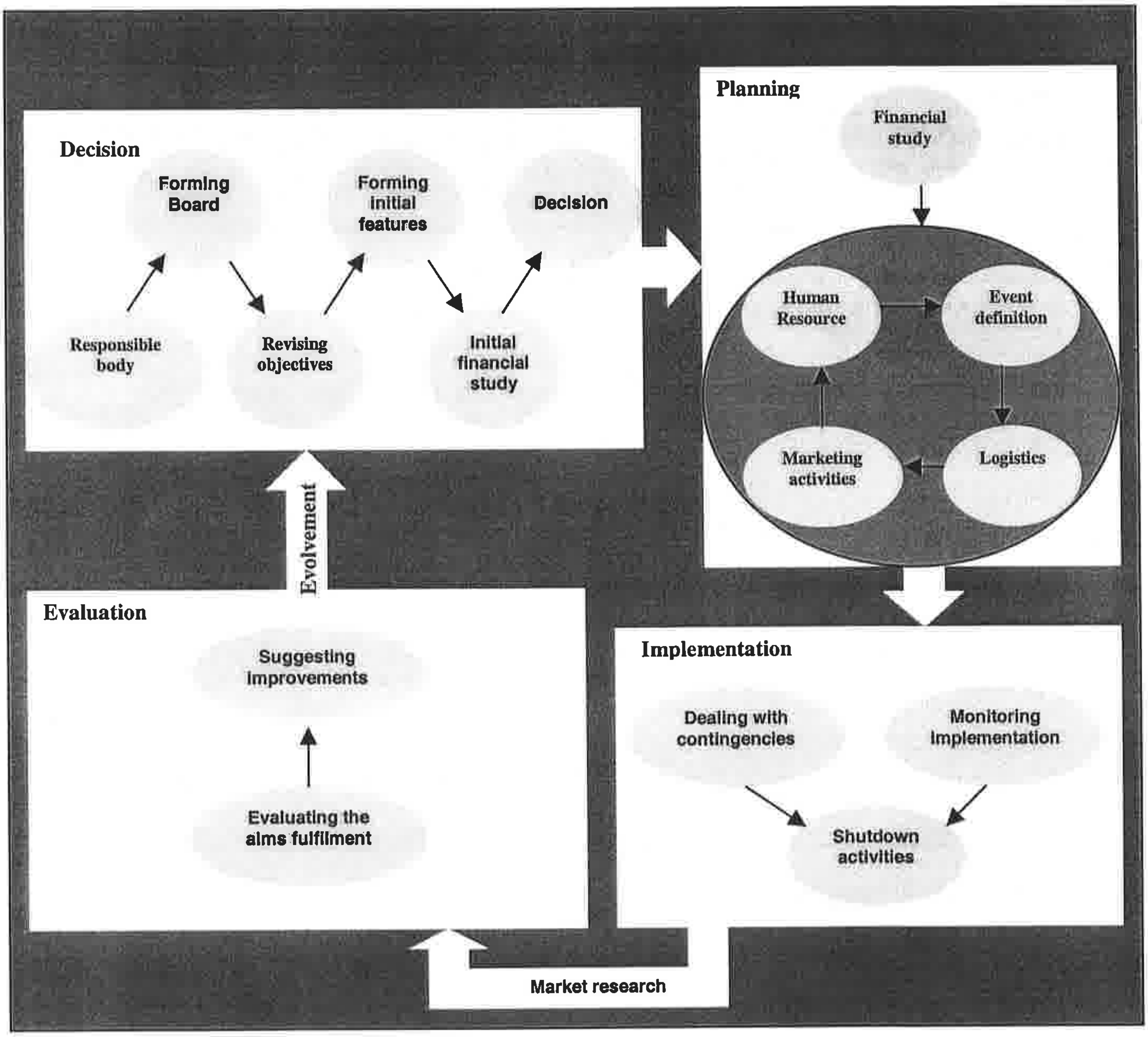

Figure 6.1 The NBF suggested best practice model

6.3 Case two: The Ismailia International Folklore Festival (IIFF)

IIFF was examined by interviewing the Manager of Ismailia Regional Association for Tourist Promotion, which organizes IIFF. The interviewee is also operating as an Executive Manager for the IIFF since 1999. The Manager of the Media and Information Department, Ismailia Governorate, attended the interview as well, as she is responsible for documenting all the information related to the IIFF.

Like the suggested Welsh model, the IIFF Executive Manager (IIFF-EM) states that the procedures for organizing the Egyptian cultural events should ideally go through the four suggested managerial phases.

> *This part* [the decision phase] *is always done by a superior individual...the Governor; or the Minister of Culture...then a board usually starts from the planning part, executes the festival and sometimes does the evaluation...if we can do all these four phases correctly and by ourselves, this will be perfect.*

Resembling the Welsh model, the IIFF-EM addresses the importance of all the five areas involved in the decision phase, but similar to the NBF, the interviewee claims that defining the event features should precede conducting the initial financial study.

> *Ideally, yes sure I agree that we should do all these parts...if I will do this part myself, I will start with forming the board,* [which] *includes the governor and the managers of the related departments; then we will put our aims, which should be clear and announced for every one; then I will put the activities; discuss all the money problems; get it sorted out; have a reasonable budget for the festival; then go on.*

Regarding the planning phase, the IIFF-EM records that all the five planning areas are already carried out with almost no major differences.

> *As I said we are receiving a fixed budget, so the whole board is responsible for the money spending, then we have a committee responsible for defining and scheduling the festival activities...concerning marketing, we do very little marketing inside Egypt because the festival is free...as well, we do not do a lot in the human resource because we rely on the official employees to do whatever duties required...of course, this* [logistics] *is the main effort we do because we averagely have 25 teams annually each team usually has a list or requirements regarding the stage and the equipment so we should be*

> *very careful when planning the logistics. For example, we always try to gather the similar teams at the same place to minimize the cost and the time...yes I can say, all of them are very critical for the planning despite as I said we do not do a lot regarding marketing and human resources.*

The IIFF-EM typically agrees with the influence of the financial study on the other areas.

> *Once we have a budget, we can define the number of participating teams we can accept because we are paying for almost everything, except the air tickets...as well, the other parts are mainly defined according to the budget...we usually know the limit of our budget at the beginning of each financial year.*

Similar to the Welsh best practice model, the IIFF-EM records that all the three areas of the implementation phase are already taking place during the IIFF, so they could not spot any difficulty regarding them. Despite, market research has never been conducted before, the IIFF-EM believe its absence is a key problem; thus market research should be considered in any potential model.

> *Yes, we definitely do all these three tasks...No; I do not think we have any difficulties in this part...we did not do any market research before; but if we are putting a potential model to be applied in Egypt. Market research should be done every year.*

However, the IIFF-EM deems that the current evaluation standard is still less than what should be done.

> *We are trying to do evaluation, but sure I agree with the importance of it.*

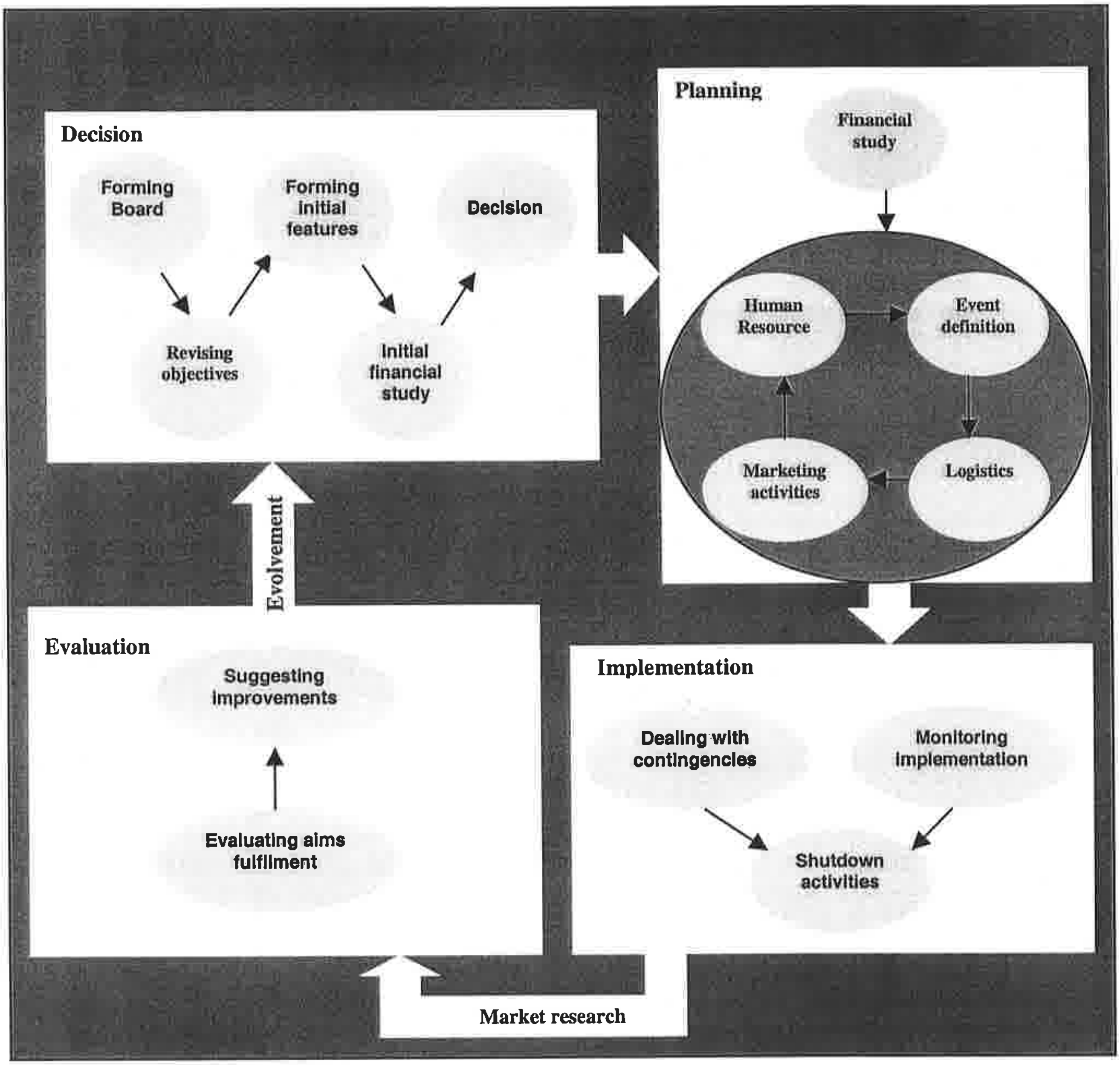

Figure 6.2 The IIFF suggested best practice model

6.4 Case three– Aida Opera Performance, Pyramids

The AOPP was examined by interviewing the Manager of the Planning Department in the Egyptian Opera House, who has been working as a coordinator between the organizing committees working on the AOPP 2002.

The AOPP Coordinator (AOPP-C) records that the managerial procedures for organizing the Egyptian cultural events should rehearse the four suggested managerial phases, which are reasonably embodied in the AOPP practical model.

> *You can see in the model, you put for Aida, that we are almost doing these four parts…this is not ideal for managing special events only, but I think this is the supposed cycle for running any project.*

Regarding the decision phase, the AOPP-C assumes forming board and revising objectives are already applied, but as mentioned before, it could be hard to make a justified decision due to the potential financial loss, whereas both the initial financial study and the initial forming for the features are likely to be useful if applied.

> *Again, we are already doing this phase* [the decision phase], *maybe slightly different…but financially, I cannot justify the event if we are speaking about official accountability, as the event likely achieves financial loss…if we do an initial financial study and initial forming for the activities that we are going to do, I think this will help us at least expect what we are going to face before starting the planning.*

In the case of the detailed planning phase, the AOPP-C claims that the detailed planning phase five areas absolutely reflect what is applied now, which he assumes offering an optimal model. However, the AOPP-C records that the financial study is likely to have an absolute influence on all the other planning three areas. However, due to the continuous financial loss of the AOPP the AOPP-C claims that more attention should be paid to the financial studies.

> *Again, these five areas are very similar to what we already do and what the model* [the AOPP model] *shows here...you know we had some problems*[1] *in the financial side. So I can accept to try to give more attention to the financial study to be sure about it before the other parts in the planning phase.*

Similar to the Welsh best practice model, the AOPP-C records that all the three areas mentioned in relation to the implementation phase are already applied.

> *We are doing these three areas* [the implementation phase three areas]*...the problems here are that in 2002 we did not stick to the programme timetable and we had the problem with some actors, I think it was handled in a good way...we will do much better the next time; I do not think it is a major problem anyway, except it cost us more money.*

Despite doing financial evaluation only, the AOPP-C claims it was not enough regarding the evaluation both quality and volume. However, the AOPP-C records that evaluation should not be confined to assessing the fulfilment of the event aims but should also pay attention to evaluating the benefits for the community.

> *What we are doing now, is just answering questions about what did we do financially?...sure, we need to do more and more evaluation, and I am speaking comparing to the quality and the volume of the evaluation we are doing now...evaluation is important, especially this related to the community.*

[1] Aida 2002 faced serious financial problems due to the withdrawal of the funding entity on the opening day due to financial disagreement, which led to the withdrawal of some key actors after the first performance. However, the following three performances were completed with Egyptian actors instead of the international key performers. The EOHA (the organizing entity) was toughly blamed for the continuous financial problems.

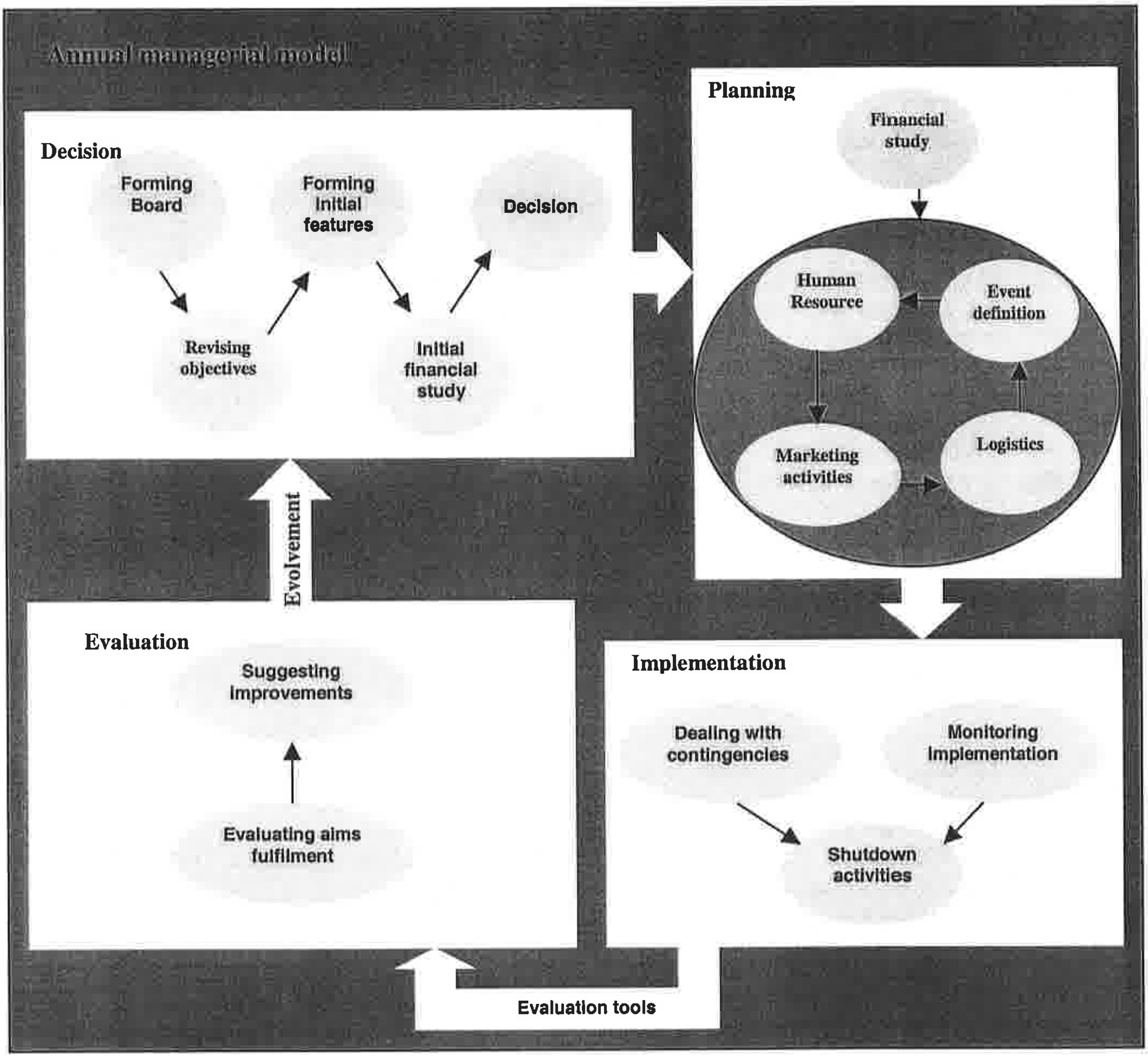

Figure 6.3 The AOPP suggested best practice model

6.5 Modifying the Welsh best practice model

From the above-mentioned comments of the Egyptian events practitioners, it could be concluded that similar to the Welsh best practice model, all the three Egyptian organizers record that the annual managerial model for organizing cultural special events in Egypt should ideally go through all the four suggested phases, which include: the decision, the planning, the implementation and the outcome evaluation phase, which jointly provide a generic framework for managing cultural special events in Egypt.

Regarding the decision phase, all the three Egyptian organizers address the importance of all the five areas involved in this phase, which are: forming the board, revising the objectives, forming the event initial features, conducting financial study and decision-making. Nevertheless, unlike the Welsh best practice model, the three Egyptian organizers assert that ideally forming the initial features should precede the initial financial study. In this respect, the Egyptian organizers claim that one of the Egyptian special events' problems could be the continuous financial shortage that could be attributed to the unrealistic estimate of the predefined budget, which does not consider the actual activities taking place.

Similar to the Welsh model, all the three Egyptian organizers concur with splitting the detailed planning phase into five areas including: event definition, financial study, human resources management, marketing activities and logistics. In addition, the interviewees agree with the influence of the financial study on the other four areas.

Similar to the Welsh model, the Egyptian organizers record that all the three areas of the implementation phase, which are: monitoring the implementation, dealing with contingencies and shutdown activities, are already applied during the management of the Egyptian cultural special events, with no obvious difficulties, despite applying unplanned monitoring for the implementation during the NBF. On another hand, the Egyptian practitioners deem that the absence of valid information, notably concerning the customers' characteristics hinders the process of providing proper events. Consequently, the Egyptian practitioners agree with the importance of conducting market research at the end of the implementation phase in order to fill in the notable gap of knowledge, especially concerning the customers of the cultural special events in Egypt.

The Egyptian practitioners believe that the evaluation of the cultural special events in Egypt, present a key managerial problem, to which the failure of some of the Egyptian cultural events could be attributed. In this respect, the Egyptian practitioners state that evaluation is rarely conducted and is inadequate, regarding both quality and volume, which subsequently leads to a lack of improvement present in the next event. However, the Egyptian organizers believe that evaluation is critically important, for both assessing the fulfilment of the special event aims and providing justified improvements for the succeeding events.

6.6 Building a consensus

As previously mentioned (see sections 2.4.2.2 and 4.6), a Delphi technique was utilized for building consensus, where the experts' opinions should be gathered, analysed and circulated to the experts for further comments on their opinions aiming to facilitate building a consensus. In this context, the Egyptian practitioners were interviewed again where they received a copy of the three models developed from the first round of discussion. The Egyptian practitioners were then asked to review their ideas in the light of the other practitioners' opinions and to indicate which opinion they think to be the most appropriate concerning the existing dissimilarities.

Comparing the viewpoints of the practitioners of the three Egyptian cultural special events shows a minimal difference between the suggested models supplied by the Egyptian practitioners, who generally agree on the validity of utilizing the suggested Welsh best practice model as a potentially applicable model for managing cultural special events in an Egyptian context.

In this regard, the Egyptian practitioners suggested two modifications to the Welsh best practice model, which both relate to the decision phase: first, identifying the special event initial features before conducting the initial financial study; second, addressing the role of the responsible body in managing the Egyptian cultural special events. However, all the three Egyptian practitioners referred to the first modification during the first round of discussion. Consequently, no more discussion was required to facilitate building a consensus and therefore validate modifying the Welsh best practice model concerning this point. Regarding the second modification, the NBF-S referred to the importance of the role of the responsible body (e.g. the Regional Association for Tourist Promotion, Cairo), which always initiates the process of managing cultural special events in Egypt. However, neither the IIFF-EM nor the AOPP-C referred to this role.

Building a consensus concerning this late point required one additional round. In this respect, both the IIFF-EM and the AOPP-C state that the existence of the responsible body is a reality that cannot be disregarded due to the circumstances of the Egyptian governmental work. This would usually include the handing of responsibilities from a senior governmental entity (e.g. the Ministry of Tourism), which plays the role of the first year catalyst, to another junior entity (e.g. the Regional Association for Tourist Promotion, Cairo) to be responsible for the event management.

> *This is a reality; in our case the Manager of the National Folklore Team was the festival creator, but the real responsible entity was the Ministry of Culture or the Ismailia Governorate...*[and] *each of them was always forming a board to organize the festival...and each year the festival starts*

> *by a permission from the Governor as a representative for the responsible body* [Ismailia Governorate].
>
> IIFF-EM
>
> *According to what you mentioned in our model* [AOPP model] *we* [the Egyptian Opera House] *are the responsible body, so sure I am 100% agree that the role of this responsible body should be mentioned on the model... we exist every time Aida is going to be organized.*
>
> AOPP-C

As a result, a second modification was inserted to the Welsh best practice model, where the decision phase will be initiated with a responsible body, which takes the responsibility of forming the event management board.

As a result, a potentially applicable model for managing cultural special events in an Egyptian context could be concluded (figure 6.4).

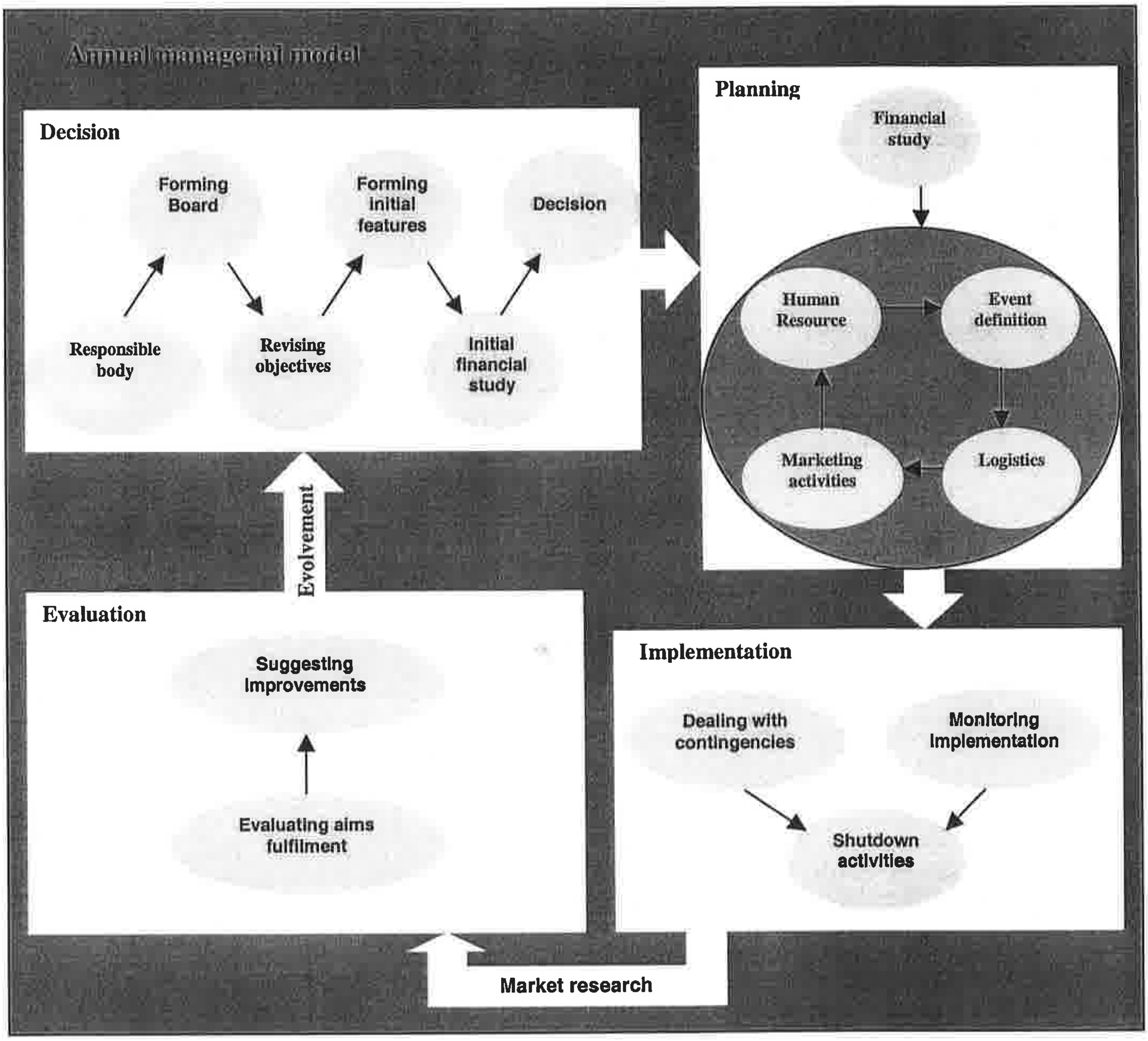

Figure 6.4 Potentially applicable model for managing cultural special events in an Egyptian context

6.7 Summary

This chapter investigated the third phase of the fieldwork where the Welsh best practice model was reviewed by the Egyptian cultural special events practitioners, through semi-structured interviews associated with Delphi technique, aiming to explore the Egyptian practitioners' viewpoint concerning the Welsh model. The Egyptian practitioners were asked to identify the modifications required, if any, in order to put the Welsh best practice model in an Egyptian context. The semi-structured interviews have resulted firstly in three reasonably similar managerial models, where the Egyptian practitioners provided two suggested modifications concerning the decision phase: first, identifying the special event initial features before conducting the initial financial study; second, addressing the role of the responsible body in managing the Egyptian cultural special events. However, A second round of semi-structured interviews was required to facilitate building a consensus on a potentially applicable model for managing cultural special events in an Egyptian context.

Chapter seven

Solving the Egyptian managerial problems

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7.1 Introduction

This chapter discusses the six problems identified in chapter five, to which the failure of some of the Egyptian cultural events can be attributed in order to provide best practice procedures to manage these problematic areas. The six problems are investigated in detail and suggestions are made for rectifying them. The problems are: first, the absence of SMART objectives; second, the absence of initial financial study; third, unjustified decision-making about launching the special events, fourth, the insufficient lead-time for the planning activities, notably promotion, fifth, the absence of market research; and finally, the absence of outcome evaluation. The theoretical procedures are produced in form of a guide, which is then discussed, through semi-structured interviews, with the Welsh practitioners aiming to put it in a practical form from the Welsh practitioners' viewpoint. The Welsh best practice guide is then discussed with Egyptian practitioners in order to put it in an Egyptian context (appendix 1).

7.2 The theoretical guide

In chapter five, the Egyptian practitioners identified six managerial problems to which they believe the failure of some Egyptian cultural events should be attributed. Thus, a theoretical guide of the literature is developed to provide the theoretical procedures for addressing each of the problematic managerial areas.

7.2.1 Absence of SMART objectives

Aims are usually defined as statements, which express generally, and often on a long-term basis, what is expected to be achieved without providing sufficient details. Thus, they are usefully broken down into SMART objectives (Doran 1981). Investigating the Egyptian cultural events showed a clear absence of SMART objectives, which could be linked to further problems including: absence of justified decision-making and absence of outcome evaluation. *"Objectives should be SMART"* (Watt 1998, p.10). Forming SMART objectives is likely to go through a two-step process:

Step one: Writing SMART objectives

- The management team should define precisely the event aims, which form the basis from which the objectives would be deducted (Hall 1992) (e.g. to attract international tourists).
- The management team should then identify the detailed procedures (objectives) required to jointly contribute to fulfilling each aim (Youell 1994).
- Each objective should be expressed in action verbs (Allen 1998) (e.g. to increase the number of the French tourists attending the event), and specify quantitatively, if possible, the improvement required (e.g. 1000 tourists, £10,000).
- The management team should be sure that each objective relates to the event nature and area of interest (Youell 1994) (e.g. tourism, folklore); and that it could be achieved taking into consideration the event availabilities. Afterwards, a specific date should be set for fulfilling the event objectives (McDonnell *et al* 1999).
- Finally, the objectives should be reformed to be SMART objectives.

Step two: consensus on SMART objectives

The SMART objectives formulated in the first step should then be discussed in detail with the senior staff members to confirm consensus on them.

- Each member of the Management Board and the event management team should be given the opportunity to comment on the SMART objectives (Watt 1998).
- The comments should then be gathered and the objectives should be appropriately revised in the light of the comments.
- The new SMART objectives should be checked to confirm the agreement of the Management Board and the event management team.

- The final SMART objectives should then be disseminated amongst all key staff members (Getz 1997).

Once the SMART objectives have been agreed and disseminated, each member of the management team should be invited to develop an action plan for his/her area of responsibility (Youell 1994). The action plan will link the SMART objectives to specific members of the staff who will undertake the requisite actions. In this regard, it should be understood that the suggested SMART acronym does not mean that every objective should have all the five criteria; nevertheless, the closer to the five elements, the smarter the objectives will be (Doran 1981). Finally, the special event's SMART objectives of a particular year are likely to be revised and therefore used as a base for setting the following year SMART objectives.

7.2.2 Absence of initial financial study

An initial financial study is required to check that the event is financially feasible; and it does not need detailed answers; indications are sufficient (Salem *et al* 2004). The Egyptian organizers believe that the absence of initial financial study contributes to the failure of some of the Egyptian events as it leads to underestimating the budget required; besides increasing the possibility of financial loss due to starting the planning phase without sufficient data on the potential financial situation.

The initial financial study takes the form of a preliminary, and often informal, review of the potential financial situation rather than a deep investigation aiming to help the decision-makers identify the likelihood of meeting the event's financial expectation (McDonnell *et al* 1999) (e.g. not to exceed a specific budget; to achieve the even-break; or to achieve a profit).

The initial financial study should go through a three-step process, which has already been discussed in detail in chapter three (see budgeting: 3.4.2.1):

- Identifying and estimating cost elements;
- Identifying and estimating income sources;
- Reviewing and decision-making.

Obviously both initial and detailed financial studies are going through the same course of procedures. The main difference between the initial and the detailed financial study is the scale of the study as no detailed answers are expected out of the initial financial review but just indications of financial feasibility (Salem 1998).

7.2.3 Unjustified decision-making regarding event launching

Numerous decisions should be made throughout the event life regarding almost everything (e.g. the event features, pricing, logistics, promotion). Yet, one of the key decisions in the event life is this made at the end of the decision phase where a decision is made to define whether the event should or should not be launched. Ideally, this decision should be justified. The sort of justification differentiates from a new event to a recurring event. For a new event, the indications of potential success or failure supplied by the feasibility study, which is done during the decision phase, can provide a professional justification for the decision-making. For a recurring event, the success or the failure of the previous event is likely to be the major justification for continuing or terminating the next event. On the other hand, the market research conducted during the event evaluation phase, could also be used to enhance this justification.

The study of the Egyptian cases revealed that none of them could provide a logical justification for why they were launched. The Egyptian organizers assume that the Egyptian events are mostly launched relaying on governmental unjustified orders rather than justified decisions. On the other hand, the Egyptian organizers claimed that the absence of initial financial study hinders the possibility of providing logic justification for launching new event. As well, the absence of outcome evaluation boosts the difficulty of providing justification for the recurring events. In this context, it could be argued that sorting this problem out is based on solving the Egyptian first (i.e. the absence of financial study), fifth (i.e. absence Market research) and sixth problem (i.e. absence of evaluation), which will then provide the required logic justification. Thus, no further specific procedures can be suggested.

7.2.4 Insufficient lead-time for the planning activities, notably promotion

Planning is the most time-consuming phase. While event implementation usually takes a few days or at most some weeks, the event planning commonly takes months or even years. The Investigation of the Egyptian cases suggests that more time is required for the planning activities, notably promotion. In this context, the Egyptian organizers suggest that more time should be given to the planning procedures, which should ideally range between six months and a year, depending on the nature of the organizing entity (i.e. full-time or part-time), the volume of work (i.e. the event size), and the targeted market (i.e. local or international).

Most of the managerial activities will fall into an annual management routine. However, promotion needs specific consideration, as timing has a key role in the effectiveness of promotional activities. Events usually target different market segments. Thus, different promotional channels (e.g. newspapers advertisements, posters, billboards, Internet) are often used for promoting the event to different market segments. Each of these channels requires a different lead-time to maximize its effectiveness. Timing is mainly defined depending on the utilized promotional tool, the features of the targeted market (e.g. local, international), the cost and the budget available. Literature on special events does not give any indications regarding how far in advance the promotional activities should begin. However, table 7.1 illustrates the timing suggested for each promotional channel in terms of the target market.

Targeted group	Promotional channels	Timing
Local residents	Posters Newspapers ads. Media ads. Leaflets Internet	Two weeks Two weeks One week Four weeks Four weeks
Regional visitors	Posters Newspapers ads. Media ads. Leaflets Internet	Two weeks Two weeks One week Four weeks Four weeks
National visitors	Posters Newspapers ads. Media ads. Leaflets Internet	Four weeks Four weeks One week Eight weeks Eight weeks
International tourists	Posters Newspapers ads. Media ads. Leaflets Internet	Four months Two months ---------------- Six months Six months

Table 7.1 Suggested timing for each promotional channel in terms of the target market.

7.2.5 Absence of market research

Market research is an imperative process as its outputs embody a reliable base for proficient decision-making (Housden 2003) throughout the event life. Investigating the Egyptian events disclosed that no market research was conducted either during the decision or at the event of the implementation phase. Theoretically, market research can go through a seven-step process.

Defining the data required: market research can provide data on various issues related to special events (Getz 1997), such as the event potential customers (e.g. characteristics, preferences), marketing activities (e.g. promotion, pricing), event features (e.g. timing, location), logistics (e.g. parking, attendants' flow) and sponsors (e.g. history, decision-makers). Thus, all the management team should specify the areas for which they need data.

Collecting secondary data: the sources of secondary data are mostly of a documentary nature (e.g. documents, films). *"Secondary data have cost and time advantage over primary data"* (Parasuraman 1986, p.166), thus it could be preferable for small events. The main problems are usually related to the data availability, validity and suitability. *"There is a large amount of secondary data available...while only a very small proportion...may be useful"* (Proctor 2000, p.58).

Collecting primary data: primary data could provide more creditable data, if done properly (Bailey *et al* 1995). Defining the precise data supplier (e.g. customers), selecting the proper data collection method and securing the required fund, time, and trained staff are the key factors for efficient primary data collection (Watt 1998).

Defining the data collection method: data collection methods vary widely (e.g. surveys, interviews, observation) (Parasuraman 1986). Each method has its merits and demerits. Selecting the data collection method should base on the nature of the data required and the organizers' capabilities regarding time, fund and staff (Goldblatt 1997).

Planning the data collection: includes preparative processes, such as selecting the survey sample, the interviewees or the location of observation, developing the question schedule, the topics checklist or defining what will be observed, besides identifying the appropriate time, place and atmosphere for conducting the fieldwork (Procter 2000).

Fieldwork: represents the practical process of data collecting using the chosen method(s), with the selected sample, or interviewees at the predefined time, place and environment. The success of the fieldwork depends on the planning proficiency, the efficiency of staff members conducting the research who should understand the data collection requirement and be trained before starting the fieldwork (Procter 2000).

Analysis and conclusion: the nature of the data collected, time, facilities and fund available are the main factors affecting the data analysis process (Crimp and Wright

1995). The results revealed from the data analysis could take the form of answers for particular questions, recommendations or more elucidated results. The research conclusion should then be reported to the event key organizers and decision-makers. Finally, it should be recorded that while, conducting market research for an existing event is relatively a straightforward process as the event attendants could represent legitimate data providers, identifying the proper data providers for a new event could be problematic. Thus, new special events would probably depend more on the data deducted from the similar previous special events.

7.2.6 Absence of outcome evaluation

Outcome evaluation is *"the process of looking back at an event, identifying good and bad points,* [asking why], *and learning for the future"* (Youell 1994, p.103). The study of the Egyptian cases demonstrated that there is little evidence of outcome evaluation. The Egyptian organizers claimed that the absence of outcome evaluation is a main reason for the continuous failure of some of the Egyptian cultural events as it hinders both the identification of any unfulfilled aims and exploring the event's disadvantages, which may lead to an inevitable absence of rational improvements for the subsequent events.

Evaluating the fulfilment of the event aims

This can be done through a five-step process.

Identifying the event objectives: evaluating the objectives' fulfillment bases on a careful comparison between the event's projected objectives and the actual outcome (Keeling 2000; McDonnell *et al* 1999); thus the initial step should be listing the event objectives.

Defining the data required for assessing the objectives' fulfilment: the evaluation team should define the data required for assessing the projected objectives fulfilment (e.g. data on the number of visitors and their nationality). This will lead to identifying the suitable data collection method(s) (e.g. survey; documents) (Getz 1997).

Obtaining the required data: which is usually done at the end of the event implementation, if using tools such as observation and in-site survey; or after the event implementation, in case of using tools like in-depth interviews and document analysis (McDonnell *et al* 1999).

Comparison: the data revealed from the previous process should be compared to the event objectives to define the extent to which the event objectives have been fulfilled.

Inquiring why: If all or some of the objectives have not been fulfilled then an inevitable issue, would be asking "why" (Shone and Parry 2001), which might require several rounds of in-depth investigations before specifying the reasons for failure (e.g. the promotional campaign failed approaching the targeted segments).

Suggesting improvements for the following event

Outcome evaluation should contribute suggested improvements for the following events. *"Improvement can be looked at in several ways. First, there might be activities that went well that could be strengthened further. Second, there are those activities that went well in such a way that they are best left untouched. Third, there are those activities that went badly, that need sorting out"* (Shone and Parry 2001: p.263). Suggesting improvements can go through a four-step process.

Identifying problems: all the staff members should be asked to report any problems they experience as they occur (Getz 1997).

Identifying the causes: the staff members role should then extend to suggesting the possible causes for each problem and then ask them to suggest how these problems could be avoided in the future (Shone and Parry 2001).

Identifying what went well: the staff members should also identify the things that went particularly well and to suggest possible improvements (Shone and Parry 2001).

Suggesting improvements: the suggested solutions and improvements should then be listed and reported to the Management Board in the final report to be considered when organizing the following year's event (McDonnell *et al* 1999).

7.3 The Welsh best practice guide

The theoretical guide developed from literature was utilized as a projective instrument to enhance the semi-structured interviews with the organizers of the previously selected Welsh events aiming to modify the theoretical guide into a best practice guide from the Welsh practitioners' viewpoints. In the case of the LIME, the interview was conducted with the LIME General Secretary (LIME-GC). In the case of the MF, the interview was done with the Special Events Manager (MF-SEM) and the Marketing Director (MF-MD); while the Activities Manager was interviewed in the UE (UE-AM). All the interviews took place in the interviewees' offices. The interviewees were interviewed once and were all recorded with the permission of each interviewee.

7.3.1 SMART objectives

The LIME-GC believes that giving the team supervisors, who are likely to be volunteers, the responsibility of setting action plans for their areas could be unrealistic as some of them are likely to lack the experience for managing this sort of work discipline, which hinders them from setting such precise plans. Thus, they should not be left to formulate the action plans alone, but should be undertaken by the professional managerial members.

> *This section in the bottom "each member of the management team should be invited to develop an action plan for his/her area of responsibility". I am trying to think of that in terms of our own organization and I found that would come across certain individuals that cannot work that way…because they…cannot use to working in that sort of discipline. So, that I think where our professional input comes in, our chief executive etc. they will do it with*

> *them; give them the help they need to go through it. I do not think you can just hand it out…one of our critical areas is the hospitality side, she is a lovely lady, but…she was not really doing it this way, that we have to have a professional input…*[for how long did you leave her to do it her way?] *For years…and then problems started to arise. I am not going to detail, but we had some problems because she was not financially orientated in anyway and she could not see things that way; booking of accommodation and hotels and these things got out of hand. So, she was losing the plot a little bit. So that again where you need a lot of time spending with someone around that to go through it in detail and that is what a professional can do; like the chief executive. We are volunteers; we probably do not have the time to go into it.*
>
> LIME-GC

The UE-AM records that the suggested procedures reflect precisely what are done in the UE. Nevertheless, the UE-AM states that the objectives should clearly be well linked to the event availabilities.

> *Yes, yes, we have this aim, which is: attract more families and people and market it more as a day out, as well as a competition; and also make it more relevant to the young people that come to the festival; and every year, you know, according to a budget, according to the companies that wish to be involved. We are trying to push more towards that…right, that is definitely something that we do…we have a staff meeting over three days in September each year, where this kind of things are listed; what we have as a location, what amenities that location offers to us, how can we use what is offered to us as far as people who want to sponsor us, people who would like to be in the event, the local area, the community, what it has to offer, what can we use in order to achieve our objectives for this year eisteddfod. For instance, we are still trying to concentrate on attracting people that are not the usual eisteddfod goers to the eisteddfod and trying to make it more of a festival, more of an event, more of a family day out, as well as the competitive element. So, this year that is one of our objectives this year. So, we will have a look on what we get here, what company are welling to be involved this year, what sponsorship we have and we are trying to use that as best as we can in order to attract families.*
>
> UE-AM

The UF-AM noted that forming objectives should not be confined to the Management Board, but key volunteers, especially those with long experience, should participate.

> *SMART objectives, step two, no 1; also something that is practiced by us...the management that we do. We get team of staff but also the festival is very much reliant on volunteers...so we do have active board that is very much involved with us in that sort of, as well, a team of volunteers that have the same power as members of staff…we have to check not only that the members of staff are ok with this but volunteers who have been so involved with us for long years. They have more expertise than us in some aspects and so this is definitely something that we do.*
>
> UE-AM

7.3.2 Initial financial study

LIME-GC claims that the suggested procedures for conducting the initial financial study imitate what should be done, where using the previous event's budget is usually the baseline for estimating the current event budget. However, the LIME-GC warns that the figures of the previous budgets should not be taken as a guarantee and should always be revised considering shifting factors, such as the community overall financial climate, the volume of promotion and the activities provided.

> *On the cost elements, that is fine obviously. You can use the previous suppliers for a period but you must always check it regularly…the income is the biggest problem of course. Yes, you must use obviously your previous experience; get bear in mind variables like weather in our case, financial climate for tourism…the expenses you putting in the extra marketing and the extra advertising.*
>
> LIME-GC

LIME-GC insists, as well, that all the senior members should participate in forming the initial budget, under unified professional supervision, which should be fully aware of the whole financial situation aiming to avoid unseen problems due to individuality.

> *We did have that bad year and we realized that we had the bad results without really realizing that they were coming…it was a nasty surprise because we have been looking in its items individually and not adding up what the overall effect was going to be…we really had a shock; and since we get little more professional with our chief executive, it is working well.*
>
> LIME-GC

The UE-AM stated that the expenses should be considered before the income.

> *There is a Welsh saying, "cut the coat according to your cloth". So, that what we do every time…our budget; our finances are constantly been reassess according to how much money the local people have raised.*
>
> UE-AM

7.3.3 Chronology of detailed planning regarding promotion

The LIME-GC agreed that the promotional timing differs according to the targeted market and the utilized promotional tool; nevertheless, LIME-GC stated that the targeted segments should be divided into national visitors and international tourists. Regarding the national visitors:

> *Poster before two weeks, three weeks; newspapers' ads, two weeks is fine. Media ads, yes…Internet is good, that is permanent, you just change your website as you get more information you add it…*[regarding leaflet] *in addition to this form, which is our big one. If we not getting quite the response that we were looking for with some of these concerts…these last two years we have produced single leaflet for just that one event just a bit of doing direct mail going with somebody else or local posters. So leaflets in a way take two forms, the general one and the specific one.*
>
> LIME-GC

Regarding the international visitors,

> *You will not believe that but…leaflets have to be ready for 2005 at the 2004 event because they can take them home with them…we are trying to get this* [the LIME leaflet] *out, but this is too much; you want to book all these artists. So it is a much simpler even a single sheet thing that gives the date and a rough outline of 2005.* [So leaflets should be ready a year before?] *That is the best way reaching the actual people that are interested…we will not send out posters.* [Newspapers and media ads] *No.* [Internet?] *Permanently on the website.*
>
> LIME-GC

LIME-GC states that two types of promotional campaigns should be considered: the campaign accompanying the seasonal ticket release and this accompanying the general ticket release (i.e. the event release).

> *Initially, we have fixed dates for selling seasonal ticket and another date for the general ticket. So we advertising in the media and newspapers the week before those dates...so if you want season ticket on the 1st of November, we would advertise the last week in October. So you get two types of advertising, ticket advertising is a totally different time scale to general advertising of the event.*
>
> LIME-GC

The MF-SEM commented that the event did not target international tourists. Thus, no timetable can be suggested for the promotion.

> *We certainly do not target international tourists unless they ask. I mean sometimes, the education department, we have an e-mail saying: we are bringing cultural French students to the site in mid May is there anything specific happening at this time? And then we can send an e-mail saying yes we have craft event or we have whatever.*
>
> MF-SEM

A periodic leaflet is usually produced every three months promoting all the activities taking place in the Welsh Museum at St. Fagans, including the cultural events. However, similar to LIME, late direct-mailed leaflets are usually printed. The purpose in this case is to draw the potential customers' attention to all the recent changes.

> *Because we have a booklet called what's on? And this is usually prepared for three months...this is April till June. We already prepared July to September. So the deadline now for the Christmas one is 12 of July, so we have to have everything ready for that one in advance ...sometimes people will say: oh yes, I will come and do that; and then they will change their minds...sometimes, that* [the periodic leaflet] ha*s gone to print and two or three people said: we would like to come to the museum and do this, this and this. She* [the MF Marketing Director] *will write to people saying: oh, I like to draw your attention to these things which happening in the garden or in the farm.*
>
> MF-SEM

Posters are usually released at the event week to present the event activities, which are guaranteed to take place, as far as possible; the Internet is constantly used and no media adverts were produced due to their high costs.

> [How long before do you release posters?] *Three, four days; simply because again people change their minds; people pull out...Internet we have a web officer. So, every time I produce a poster, I e-mail it to the web officer and he then put it... it is continuous. If anything new comes up I just send him an e-mail saying can you please put this in.* [Do you do any media adverts?] *No, no; because it is high far too expensive.*
>
> MF-SEM

General press releases are usually produced six months ahead; nevertheless specific press releases about the event activities are produced a month ahead and media releases are usually produced seven to ten days beforehand.

> *For the press releases, I would put something general, very general because we do not really know beforehand what is going on; but we do send a lot of general information onto the Wales Tourist Board and to national magazines six, seven months before...and then we leave it then until we have more information; write another press release and get that about a month beforehand; and then about a week, ten days before an event, we really push it, especially with local papers and television and radio...not advertising but for press work, television never really now if they are going to do anything at all. It is totally on the day; it depends what is on the news, what gaps they want to fill...we do not do any paid media really.*
>
> MF-MD

Despite UE does not target international tourists, UE-AM agreed that the promotional activities that target them require a timetable differs from these target national visitors.

> *Oh, definitely because international tourists will be planning what they doing...the international tourists would have to plan months beforehand... the local residents, they can decide that morning if they want to go or not;*
>
> UE-AM

Regarding national visitors, leaflets are usually the first promotional tool to be used, six months ahead. Posters and press releases are usually produces a month beforehand. The media adverts are often done one to two weeks before the event opening, while Internet is a continuous promotional tool.

> *As far as posters to promote the event I would say from now; something like a month...the national papers now for about a month before will be running stories...*[do you do TV adverts?] *Yes, it is one week, two weeks before the event...leaflets; we have been posting out leaflets for about six month now, if not more; but we are also arranging that the local tourist information points; the tourist board, hotels you know, they have the leaflets, they have a supply of our leaflets for some month now...*[the Internet?] *it is there forever. It is constantly updated but we have an eisteddfod website that is; well we have 2005 and 2006 on it already.*
>
> UE-AM

7.3.4 Market research

The LIME-CG agreed with the procedures of market research, nevertheless he drew attention to the care required concerning forming the questions and sampling.

> *Yes, you certainly right about doing data collection. The preparation of the questions is so important. Ask a lot of questions and at the end they are minimal because the questions were structured badly...I still think that if you are not careful, people that do the interviewing will pick on the people that are easy to interview. In other words, people that are setting down on the ground eating their sandwiches or whatever. The busy people, the youngsters, the in and outs, you miss. So I am not sure that we do not get a bias in certain directions. It is not done on a statistic basis, you know, every tenth person, who comes through the gate. That will probably be better. But it is not practical to do that.*
>
> LIME-GC

The LIME-GC also referred to the importance of employing professionals for managing the market research:

> *We were being criticised the lack of professional marketing and we engaged a professional analyst to look into it for us. This was very worthwhile. He came up with specific suggestions, which we took up. We appointed him full time professional marketer. I mean obviously as you say here, you assess what skills you get within your own organization team; and what is not there you get to go outside for someone…in that case for instance, where we can not marketing, we employed someone to do it then he arranged in terms of surveys and opinion sessions and so on.*
>
> LIME-GC

On the other hand, the MF-SEM recorded the importance of defining the proper time for conducting research.

> *It is usually an exit survey, so they catch people…usually after a minimum of two or three hours' visit. They try to catch them on their way out, but if it is very slack and quiet, then they go out onto the campus…if people are setting their relaxing or a mother setting in the play area just keeping an eye on her children, they can do it their; and then that way, the mother does not feel that her time has been wasted…because at the bad time you not going to get good response...but if they are approached while they are relaxing…then they will be more prepared.*
>
> MF-SEM

Referring to the problem of getting access to the customers in case of new events, the MF-SEM suggested using techniques such as "ACORN Sampling" or "Hall Test".

> *How can you contact the interviewees to arrange interviews' slots…and where did you get the data from in the first place…just wondering because that assumes you have the data and there are* restrictions *now because the Data Protection Act.* [This is a problem for the new events]. *Of course, it will be...you can do "ACORN Sampling". It is an acronym for A Classification Of Random* [Residential] *Neighbourhoods. For you given a starting address and they say right, go to the end of the street, enter to whatever fifth house, and at the end of this street you turn left, then you go to each fifth house, and at the end of that street you turn right. So, it is totally random, but you have a starting place and you are told that you can only enter each fifth house or sixth house or whatever only on the left hand side of the road…but it is time consuming, because there is no guarantee; you could knock on thirty houses and you may not find anybody in. if you are looking at ways of advertising your next event you could have a "Hall Test". You could call people in from the street and say look at these adverts, which would you choose? Which you believe the most effective?…but that is again a street sampling…telephone interview is random. You go for your telephone directory, and you take the 20th name and then the 40th name and the 60th and so on…*[we can ask the attendees of a similar event] *you could do that.*
>
> MF-SEM

The UE-AM agreed with the suggested theoretical procedures; and similar to the other two cases surveys were done to feedback to the event evaluation.

> *I agree with what you put here…that* [market research] *will help to do the evaluation. So what happened with us last year, there were a team of people that were handing out questioners to people in the way in or the way out. If they were given in the way in they were asked to fill them in during the day and bring them back to the desk. If they were given in the way out, of course, they have to stand there and fill it in. so it was done during the eisteddfod, because I think maybe you have the most honest answers because they just remember what they have been seen; if they are upset about something they will put it down. They do not have time to cool down…*[is it usually surveys?] *Yes, surveys.* [Do not you do interviews?] *No, surveys…step five, this is basically what was done with us, but we did not contact interviewees. It was only a survey what was done. But again we did developed the question schedule regards to what we want to find out; what we want to get from the information, who we targeting, what kind of answers we would like to have…analysis and conclusion; Guinean, who is our marketing manager …she is the one that actually put together this survey. In September, the same time as the staff meeting she was with us for an afternoon analysing the data that we received from the questionnaire.*
>
> UE-AM

7.3.5 Outcome evaluation

In relation to suggesting improvements, LIME-GC records that, besides the feedback revealed from the commonly used surveys, learning from the other events should be considered as another tool for suggesting improvements.

> *Our new music director went to a French Celtic festival, and he came back with a lot of experience and ideas that we should learn from…our music director and the publicity man, they went there by invitation, and they came here last year as well; their chief executive, so it is sharing experience. It is going to show itself in some new competitions.*
>
> LIME-GC

Suggesting another tools for evaluation the LIME-GC records that regular visitors could be as well an effective tool for providing feedback.

> *One of the good feedbacks is always the correspondence you get from the regular festival visitors…we are fortunate that we also have these friends, assistant organization.* [Are they doing observation?] *Yes, if they do not like what is on the stage, or if they do not like the services that we are providing in other departments, the food is not so good or parking is not good.*
>
> LIME-GC

Adding another tool, the MF-SEM suggests utilizing the public comments' analysis.

> *We do invite the public to fill forms, if they have a complaint, well, we call it a comments form; and there is a book in the main entrance hall, where visitors are invited to write comments. Most of the time the comments are silly and wasteful, but sometimes people will make a valid comments, which we can apply; maybe to the next event.*
>
> MF-SEM

The MF-SEM notified as well that the staff members should be informed clearly to whom they should report.

> *You see here, "inform staff that they must report any problems they experience as they occur". To whom? Is it to the Management Team? Or it does not tell you very clear there.*
>
> MF-SEM

The UE-AM agreed with the suggested theoretical procedures for evaluation.

> *In step one here: evaluating the achievement of the event's objectives. This was something that was done by us last year. We were trying to assess how many Welsh learners have come; if we attracted the same people every year. That was something that was done by us. Again step two: Suggesting improvements for the following events. That is something was done in the debriefing meeting. It was done through reports by our board of volunteers; the eisteddfod board they called; and in a staff meeting in September… I am not sure if you are aware that we started as an event over just a couple of days that gradually built up to be six or seven days festival and again that shows if you continually revaluate, see what you can do next year to make it bigger and better.*
>
> UE-AM

Similar to LIME, the UE-AM recorded that besides surveys, reports from the staff members and the volunteers is another tool for providing feedback for evaluation.

> [Is it usually surveys?] *Yes, surveys...*[any observation on site?] *as I said before we have a central team of volunteers; remember I said they are kind of executive volunteers; they are a board of volunteers…they are asked every year to give their feedback on our event and we do receive reports from some of them on the event and on what was good and what was bad; what was positive; what to change for the better, because as I said they are so familiar with the event. They may be better than us in spotting things…*[as a staff, do you report as well?] *If we feel that there is something that needs to be reported, we would report; but it is mostly done through the a debriefing staff meeting at the end; and that would then be, you know that, minutes would be taken from that.*
>
> UE-AM

The theoretical guide was then modified, regarding the ideas suggested by the Welsh practitioners, into a best practice guide from the Welsh practitioners' viewpoints.

7.4 The Egyptian suggested guide

The Welsh best practice guide outlined from the semi-structured interviews with the Welsh practitioners was discussed through semi-structured interviews with the organizers of the previously selected three Egyptian events: Ismailia International Folklore Festival (IIFF), Nile Bounty Festival (NBF) and Aida Opera Performances, Pyramids (AOPP) aiming to modify the Welsh best practice guide into an Egyptian potentially applicable guide. Regarding IIFF, the interviews were done with the Manager of Ismailia Regional Association for Tourist Promotion, who is operating as an Executive Manager for the IIFF since 1999 (IIFF-EM) and the Manager of the Media and Public Relations Department, who is working as the IIFF Marketing Manager (IIFF-MM). In the case of the NBF, the interviews were conducted with the Manager of the Festivals and Local Tourism Department in the Egyptian General Association for Tourist Promotion, who is working as a supervisor for the NBF (NBF-S) and the Manager of Tourist Development Department who is working as a coordinator between the administrations participating in organizing NBF (NBF-C). In the case of the AOPP, the interviews were conducted with the Manager of the Planning Department in the Egyptian Opera House, who has been working as a coordinator (AOPP-C) between the executive committees working on AOPP 2002 and the Manager of the Central Marketing Department, who has been working as the AOPP Marketing Manager (AOPP-MM). All the Egyptian practitioners were interviewed in their offices except the NBF-S' interview, which started in the interviewee's office but was completed outside. The interviews were recorded with the interviewees' permission.

7.4.1 SMART objectives

The Egyptian practitioners claim that the Welsh best practice procedures reflect mostly what should be done; nevertheless some modifications were suggested.

> *These steps are what should be done…there should not be any problem in applying them.*
>
> IIFF-MM

> *Sure, I agree with them as they are…we do not have objectives; but these steps; if we can do them the way they are written here, I think they will be successful.*
>
> NBF-S

The Egyptian practitioners suggest that: first, the objectives' achievability should not prevent them being ambitious; second, the objectives should be disseminated not only to the staff members but also to all the participating entities; third, the board should ensure that all the staff members understand the required objectives clearly; and finally, defining precise tasks for each individual could be difficult in case of depending on volunteers mainly:

> *I cannot say I disagree with this part about achievability but objectives should be ambitious as well…I totally agree with all the others…the Egyptian Tourist Promotion Association phoned me…to say a lot of the travel agencies and the Egyptian Cultural and Tourist Offices abroad do not have enough details about the festival. The role of these offices is mainly to promote to Egypt as a tourist destination abroad. They do not have any detailed aims to achieve; they do not even know what we aim for.*
>
> IIFF-EM

> *The staff should firstly understand the objectives…you should concentrate more here on explaining the objectives to the staff. This is a neglected part in most of the cases.*
>
> NBF-C

> *Each manager can put an action plan for his team in general; but it will hardly be possible to identify precise tasks for every individual; this will need a high level of coordination and control, which is difficult to be achieved in reality.*
>
> AOPP-C

7.4.2 Initial financial study

The Egyptian practitioners agree with the procedures suggested in the Welsh best practice guide regarding the procedures of conducting the initial financial study.

> *This is almost what we do here when we study the potential budget. Especially this part about the costs we usually set down to put all the costs together to see if the total costs are within the defined budget or not...as you know, we do not have income.*
>
> IIFF-ME

> *I cannot add anything to this part.*
>
> NBF-S

> *The financial procedures are presented well here; all the procedures are almost covered...we are very careful about our financial balance...at least we should cover our costs.*
>
> AOPP-C

Experience and the budgets of the previous events seem to be the main tools when estimating the event potential budget. However, the changes in the volume of promotion, the event activities and the regional and international circumstances are the main factors, which should be considered when modifying the potential income.

> *We use the experience to estimate the budget...but you should refer here to the influence of promotion, the universal and regional political situation.*
>
> NBF-C

> *Concerning the income I think promotion is the most important...the more you pay, the more you get income.*
>
> IIFF-MM

> *The political situation in the area. You know, it strongly affects Aida. Sure you know that we have been forced to cancel Aida several years, mainly due to the unstable situation in the area...as you refer here we always depend on the previous budgets unless we do something new...we usually repeat the same activities, the only thing we change is the actors.*
>
> AOPP-C

7.4.3 Chronology of detailed planning in relation to promotion

The Egyptian practitioners totally agree that the promotional timing should differ according to the targeted market and the utilized promotional tool. Regarding promotion for the citizens, the Egyptian practitioners believe that posters should be released two weeks to two months ahead; three to four weeks for the press advertisements; a month for the press releases; one to two weeks for the media advertisements; one to four weeks for the media releases; two weeks to two months for leaflets while the Internet should be used continuously.

> [Posters] *two to four weeks is enough time... this* [newspapers ads] *should be a bit more than that...three, four weeks.* [Press releases] *a month, yes this is good...this* [media ads] *is the most important and we are using them...the cost is too much so, yes, one or two weeks are suitable...the same for the media releases...*[Leaflets] *Two weeks at least. Internet, this should be from now and should be updated continuously to give the last up-to-date information but unfortunately, we do not have a website.*
>
> IIFF-MM

> *Posters need between a month to two months...*[press ads] *a month is enough, as well the press releases...for the media advertisements two weeks are good...the media releases, if it will be for free then a month. The leaflets, a month or two will be ok, and the Internet is continuous.*
>
> AOPP-C

Regarding promotion for international tourists, the Egyptian practitioners record that posters should be released two to three months ahead; two months for the media advertisements and releases through the Egyptian international channels; three to six months for leaflets while the Internet should be used continuously. However, press advertisements and releases would not be used.

> *For the international tourist, I disagree with neglecting the posters; we are trying now to send posters to the opera houses where we can find our potential customers...three months before the event will be enough...leaflets can also be sent at the same time and should offer more details about the performances.*
>
> AOPP-C

> [Posters] *two months ahead...*[press ads] *no, this is difficult, it will cost too much...the same for the press releases, I do not think we can use it...but we can use the media advertisements, through the Egyptian satellite free channels...two months ahead...we can also use our channels for media releases during the same time...the leaflets, why a year, this is long time may be three to six months at most.* [The Internet] *yes, this is ok. It should be continuous.*
>
> IIFF-MM

The IIFF-MM agrees with the idea of using posters and leaflets sooner in order to provide general idea without details, especially in case of international tourists.

> *This idea of the early general posters and leaflets is good and new. It will be very suitable for us, especially we usually do not have details until short time before the event...this is a very good idea.*
>
> IIFF-MM

On the other hand, the NBF-C claim that two factors influence the time required for the promotional campaign, which are the available budget and whether the event is a new or a recurring event.

> *There are two main factors define the required time. First, the volume of the budget and second whether the event is to be organized for the first time or have been organized before. The higher the budget, the longer the time required. As well, if the event is to be organized for the first time then it will need more time.*
>
> NBF-C

Finally, the IIFF-MM claims that one of the main reasons of the promotion delay is the fear of event cancellation.

> *I tell you why we delay. We are scared, like what happened this year, we planned a very good advertisement campaign and then we were shocked that the festival has been cancelled...which would give bad impression about the festival.*
>
> IIFF-MM

7.4.4 Market research

No modifications were suggested regarding the recommended Welsh best practice procedures for conducting market research. Arguably, this might be due to the shortage of experience concerning market research.

> *Again I would like to confirm our need for a market research...nowadays, understanding the needs of your customers is essential...this part does not need any more modification.*
>
> IIFF-ME

> *The three methods you are suggesting here. They should all be used to complete each other, especially the surveys and the observation.*
>
> NBF-C

> *The primary data is important but we always depend on the secondary data...primary data is expensive...I think this part is good and there is no need to do any changes.*
>
> AOPP-C

7.4.5 Outcome evaluation

Again the Egyptian practitioners did not suggest major modifications in relation to the procedures for outcome evaluation, which were included in the Welsh best practice guide. Again, this might be due to the shortage of experience concerning outcome evaluation.

> *We should understand that evaluation is a necessity for any success. I hope we can do these steps...I agree with this part about evaluation...all these steps could be applied here; I cannot see any problem with them...I hope we can apply this part, especially exploring the customers' view.*
>
> IIFF-ME

> *I can say that this is totally right; I have nothing to add to it.*
>
> NBF-C

> *No, as I said, I agree with this part...I think the most important is to suggest some improvements for the next event. This is really important, otherwise we are not learning from our faults.*
>
> AOPP-C

The Welsh best practice guide was then modified, regarding the ideas of the Egyptian practitioners, into a suggested Egyptian guide from the Egyptian practitioners' viewpoints (see appendix 1).

7.5 Summary

This chapter discussed the six managerial problems revealed from chapter five, to which the failure of some of the Egyptian cultural events can be attributed aiming to provide best practice procedures for conducting these problematic areas. The six problems were theoretically investigated in detail aiming to suggest proper procedures for conducting them. The theoretical procedures were produced in form of a guide, which was then discussed, through semi-structured interview, with the Welsh practitioners who provided some modifications leading to adapting the theoretical guide into a Welsh best practice guide, which was then discussed with Egyptian practitioners who suggested minor modifications leading to adapting the Welsh best practice procedures into an Egyptian potentially applicable guide (see appendix 1).

Chapter eight

Conclusion

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8.1 Introduction

Chapter eight concludes this study of cultural special event management. Section 8.2 describes the research major findings. Sections 8.3, 8.4 and 8.5 provide the research contributions to theory, practice and methodology in sequence. Section 8.6 discusses the research limitations; whereas section 8.7 explores the opportunities for future research. Finally, section 8.8 explains the researcher's personal reflections on the research process.

8.2 Major findings

Following the mounting interest in special events as a device to achieve social, cultural, economic and political aims, the Egyptian government established an annual special events agenda aiming mostly to enhance the image of Egypt as a secure tourist destination. In this respect, cultural special events have formed a significant part of the Egyptian agenda to capitalise on the prominent position of Egypt as a renowned cultural tourist destination. In their ten years of application, cultural special events in Egypt have demonstrated only partial success, which has been attributed to managerial failures. A good practice model of special events management applicable in an Egyptian context is notably lacking. The aim of this study has been to develop a potentially applicable model for cultural special event management appropriate to address the deficiencies in the Egyptian cultural special events management; then, to develop a guide that could provide potentially applicable procedures for managing the problematic areas.

The study examined the extensive literature on special event management, which resulted in the development of a theoretical framework comprising four phases, namely: decision, planning, implementation and outcome evaluation. The decision phase comprises: defining the event catalyst, generating the ideas, forming the management board, defining the event aims and objectives, forming the event initial features, feasibility study and the decision-making. The planning phase includes: the financial study, event definition, human resources management, marketing activities, and logistics. The implementation phase embraces: dealing with contingencies, monitoring implementation and shutdown activities. Finally, the evaluation phase consists of: evaluating the fulfilment of the event aims and suggesting improvements for the next event. This critical examination of the literature also revealed that while significant attention has been given to some issues (e.g. financial study, sponsorship, volunteerism), the special event management literature is still fragmentary regarding some other areas (e.g. staff structure, implementation and evaluation). However, this point will latterly be discussed in more detail (see 8.3: contribution to theory).

The investigation of the Welsh cases revealed that despite the long practical experience of the Welsh practitioners, there is not an explicit model of cultural special event management in Wales. However, the theoretical model, which was developed from the literature, was used as a projective instrument to facilitate discussion with Welsh practitioners. The discussion resulted in three relatively similar practical models for cultural special event management in Wales. Through the application of the Delphi technique, a consensus was built of a Welsh best practice model for cultural special event management. The resultant model suggested two modifications to the theoretical model. First, it split the decision phase into a non-recurring decision phase for the first-time event and a recurring decision phase for all subsequent iterations of the event. Second, it modified the sequence of the planning procedures, so that the financial study preceded all the other four planning activities.

Similarly, the research revealed the absence of an explicit model for managing cultural special event management in Egypt. In order to develop a potentially applicable model for managing cultural special events in Egypt, the Egyptian practitioners were invited to revise the Welsh best practice model and to propose what they think to be necessary modifications, if any. This led to three potential models. Through the application of the Delphi technique, the three potential models were unified in one potentially applicable model for cultural special event management in Egypt. The Egyptian potentially applicable model suggests two modifications to the Welsh best practice model to put it into an Egyptian context. First, the role of the responsible body in launching the event should be considered. Second, forming the event initial features should be done before conducting the event initial financial study.

On the other hand, examining the procedures actually applied for managing the Egyptian cultural events have resulted firstly in forming three reasonably similar managerial models. Comparing the Egyptian currently utilized models against the Welsh best practice model revealed eight dissimilarities, which were discussed with the Egyptian practitioners to identify their seriousness. The discussion led to reducing them to six managerial problems to which the failure of some of the Egyptian cultural special events can be attributed. Consequently, the literature on the six problematic areas was investigated, which resulted in a theoretical guide for managing these particular areas. The theoretical guide was discussed with the Welsh practitioners, which resulted in modifying it into a Welsh best practice guide. Finally, the Welsh guide was discussed with the Egyptian practitioners, which resulted in developing an Egyptian guide for managing the Egyptian problematic areas (see appendix 1).

8.3 Contribution to theory

The study contributes to the understanding of: first, several theoretical issues in relation to special event management; second, modelling cultural special event management; and third, the transfer of tacit knowledge into explicit knowledge.

Despite the extensive literature on special events management, some areas have received less attention. On one hand, areas such as implementation and evaluation were relatively recognized in the literature related to special event management. On the other hand, areas such as the catalyst's role, idea selection, decision-making and staff structure were almost totally neglected. In an attempt to form a comprehensive managerial model, the study tended to support these less-acknowledged areas, through investigating the literature, which specifically discuss these areas (e.g. HRM); and through examining the texts related to disciplines such as tourism and leisure management. However, the texts derived from other disciplines were modified to fit the special events context, which consequently provides new theoretical knowledge to these long neglected issues.

Another contribution is modelling the managerial procedures employed for organizing cultural special events. In this respect, besides the practical contribution of the Welsh best practice model and the potentially applicable Egyptian model which will be referred to in section 8.4, the two concluded models, *per se*, provide a theoretical pattern, which could be utilized for learning[1] and training purposes. They can as well provide a theoretical base for further research on enhancing cultural special events management in both Wales and Egypt.

Finally, a significant theoretical contribution of the study relates to presenting the first application of the projective technique to the conversion of the tacit knowledge to explicit knowledge in modelling cultural special event management. The concept of tacit\explicit knowledge is built upon the Polanyi's notion that: *"we can know more than we can tell"* (1966 cited Ambrosini and Bowman 2001, p.812). Explicit knowledge refers to the knowledge that is transmittable in formal, systematic language and procedures (Ambrosini and Bowman 2001). In contrast, tacit knowledge is the knowledge that has a more cognitive dimension (Sternberg 1994), deeply rooted in action (Nonaka 1994), more difficult to transfer or articulate (Davenport and Prusak 1998) and acquired

[1] The Welsh best practice model is already taught now in the Welsh School of Hospitality, Tourism and Leisure Management, the University of Wales Institute, Cardiff (UWIC).

through experience so it is of a more personal nature (Polanyi 1966). Consequently, for people who possess tacit knowledge, knowledge consists of mental models, which they follow in certain situations (Ambrosini and Bowman 2001). Thus, the challenge is mainly about encouraging the tacit knowledge holder to, firstly, identify her/his knowledge then most importantly to spill this knowledge systematically, which therefore enables the transfer of knowledge from the tacit to the explicit form. In this context, it might be useful to quote Ambrosini and Bowman (2001, p. 815) at some length:

> *Tacit skills that are unarticulated but that could be articulated readily if organizational members were simply asked the question: how do you do that?...the skills are tacit simply because nobody has asked the right question, people never thought of what they were doing, they never asked themselves what they were doing, and nobody else ever asked it either. There are also tacit skills that could be accessed but that cannot be expressed through the normal use of words. They could however be articulated differently, maybe through the use of metaphors and storytelling.*

However, there are few research studies, which provide texts on empirical examples of transferring tacit into explicit knowledge (Ambrosini and Bowman 2001). Thus, there is a need to theoretically know much more (Jensen 1993).

In the respect of this research, the theoretical model and the Welsh best practice model were employed as projective instruments (see 8.5: contribution to methodology) to encourage the special events practitioners (the tacit knowledge holders) in both Wales and Egypt to identify and therefore to elucidate their knowledge in an organised, explicit fashion. In this respect, the research provides the first application of the projective technique to converting of tacit knowledge to explicit knowledge in modelling cultural special events management. This arguably has an exceptional importance in the area of theorizing the practice of special events management, bearing in mind that a significant proportion of special events practitioners are volunteers or at most permanent staff members who have transferred to the profession of the special events management from other specialities (e.g. administration, teaching, tourism, leisure). Consequently, they are chiefly managing their events leaning on cognitive models, which they have devised from the experience they acquired in the field, rather than following a particular systematic, explicit managerial model.

> *We do not have a model;* [but there is someone who has a model in his mind]; *Definitely, yes...it is a very strange thing, you do not really get anywhere in this organization...you have to serve yourself for few years, in a sub-committee to get to understand anything; so it is not written down but it comes apparently from the working.*
>
> LIME Board of Trustees' General Secretary

> *Nothing like that* [a documented model]*; It happens in my mind really...so that is always in the back of our mind...but I have an idea in my mind that I ought to do this by this time...I started on Monday, 13th of October 1995, I started with the Christmas there was nobody here to guide me because the previous person left in August and nobody started organizing anything. I did not know what happened; but all I had was the old books that he used here before and I just had to take it from there. I had to pick people's phone numbers; and go through the old books. Last year he used whatever, I suppose I must be started by being told how much I have to spend. That must be the starting point, because money is always there as a starting point or a finishing point. And I had to guess what kind of expense I can afford this, this, this and this. And so if I need this, this and this, I need to find who can provide it. And I took it from there.* [So you built your own model]. *Yes. I had to because no body else did the model for me, but I have never considered my self as having built a model.*
>
> The special events manager at the Museum of Welsh Life, St. Fagans

Surprisingly, the same attitude was evidential in relation to the Egyptian cases as well.

> *I think, it is all about the experience more than having it written, if you know it well and can do it well, I think this will be enough.*
>
> The Nile Bounty Festival Supervisor

Thus to conclude, with the absence of examples of how the acquired experience could be transferred into more systemized and explicit managerial models, transferring knowledge will hardly be possible. Consequently, the absence of key experienced organizers, which is quite common in the special event management field due to the unusual nature of the special events staff members, could cause serious lack in the filed of managerial knowledge. In addition, the absence of explicit knowledge, which reflects the managerial models in the reality, may hinder the development of the special event training and academic courses. Providing such explicit models may help to ease these problems.

8.4 Contribution to practice

The foremost contribution of this study is its contribution to practice, as the study aims to develop a model for managing cultural special events in Egypt. In this respect, the study embodied three models employed currently for managing cultural special events in Wales. Subsequently, the three Welsh models were discussed with the Welsh practitioners, whose feedback facilitated building a consensus on a Welsh best practice model for managing cultural special events. The Welsh best practice model was then modified into a potentially applicable model for managing cultural special events in Egypt, through investigating the viewpoints of the Egyptian practitioners. In parallel, the study explored the managerial models utilized for organizing three Egyptian cultural events, which were then compared against the Welsh best practice model. The comparison revealed the managerial problematic areas of cultural special events in Egypt. Thus, a guide was developed to provide the potentially applicable procedures for undertaking these problematic areas. The above-mentioned progression provides several contributions to practice.

First, the study contributes directly and in particular to the practical management of the six events, which were under investigation (i.e. the three Welsh and the three Egyptian events). Modelling the currently utilized procedures for managing these six events allows their managerial teams better understanding of the managerial model they are currently applying. Such understanding should then be the bottom line for any future progression regarding the management of these six events.

Second, despite the evidential consideration paid for evaluating cultural special events in Wales, evaluation is mainly concerned with examining the fulfilment of the events' aims and suggesting improvements for subsequent events (notably regarding aspects such as marketing and activities). However, equal attention has not been specifically dedicated to evaluating the utilized managerial procedures exclusively. In this respect, the Welsh best practice model provides a valid benchmark for evaluating and therefore evolving the currently applied models for managing the cultural events in Wales, by measuring these models against the Welsh best practice model.

Third, this study was suggested as a result of the absence of a comprehensive model for managing cultural special events in Egypt. In this respect, the recommended Egyptian model is the first effort for developing a potentially applicable model for managing cultural special events in an Egyptian context. In this regard, it could be argued that the potentially applicable model supports the practical management of the Egyptian cultural events as it could be utilized either as a managerial model when organizing new events; or as an evaluation tool for measuring the currently applied models for the existing events.

Finally, examining the models utilized currently for managing cultural special events in Egypt revealed the existence of six managerial problems. In this respect, the recommended Egyptian guide provides potentially applicable procedures for conducting these problematic areas, which is critical for the development of the practical management of the cultural special events in Egypt.

8.5 Contribution to methodology

The study makes two contributions to methodology; the use of the Delphi technique and projective techniques in cultural special events management. As previously mentioned (see section 2.4.2.2), the Delphi technique is named after the ancient Greek oracle Delphi (Gupta and Clarke 1996). The Delphi technique is an approach used to gain consensus through a series of rounds of interactions with experts (e.g. interviews), where the experts' opinions from each round are analysed, summarized and circulated to the participating experts for further comments, where the experts are asked to declare the opinion they believe to be the most appropriate, and whether they want to modify their ideas in the light of the other experts' opinions. There is general agreement that the Delphi technique was first used in forecasting studies for the American military in 1944 (Gupta and Clarke 1996). Since that time, the Delphi technique has become *"one of the most well-established means of collecting expert opinions and of gaining consensus among experts"* (Green *et al* 1990, p.271), although, the technique itself and the purposes for which it has been used have been extensively modified by researchers over the years (Crisp *et al* 1997; Hanafin 2004). In this regard, the Delphi technique has been employed for building consensus twice within this research. It was, firstly, associated with the interviews conducted with the Welsh practitioners for building a consensus on a Welsh best practice model for managing cultural special events. Subsequently, the Delphi technique was associated with the interviews done with the Egyptian practitioners for building a consensus on a potentially applicable model for managing cultural special events in an Egyptian context.

This is not the first time that the Delphi technique has made a contribution to tourism or leisure research as the Delphi technique has been occasionally employed in relation to tourism and leisure management, where it has been used as a tool for forecasting demand (e.g. D'Amore 1977; Kaynak and Macaulay 1984; Lloyd *et al* 2000), assessing tourism's environmental impacts (e.g. Green *et al* 1990), forecasting risk (e.g. Cunliffe 2002), besides being involved in research on the leisure environment (e.g. Moeller *et al* 1977) and tourism sustainability. In relation to special event management, Delphi technique has been utilized twice in the published research. First, it was employed to forecast the income of the World Fair (Xie and Smith 2000). Second, it was employed in evaluating the financial impact of the Australian special events (Carlsen *et al* 2000). However, there is no previous mention in the literature of the application of the Delphi technique in modelling cultural special events management. In this context, the main advantages of utilizing the Delphi technique are that: first, it minimizes the costs and efforts required for gathering the experts, especially when they are from different countries or not in direct contact. Second, it avoids the major disadvantage of the other approaches in reaching consensus (e.g. nominal groups, brain-storming, focus groups and analytic hierarchy process technique), which risks taking account only of the perceptions of the most outspoken or opinionated members of that group or of only focusing on interesting or controversial elements (Lillian and Hykawy 1999; Fein *et al* 1999 cited Hanafin 2004). Thus, using the Delphi technique as a tool for building consensus on special events management issues offers new possibilities to research methodology.

Projective technique is *"a situation or stimulus used to encourage respondents to project part of themselves or an idea system onto an external object, thus revealing opinions and feelings more deeply than if questioned directly"* (NOP World 2004). Thus, the respondents can be provided with projective instruments, such as visual models, pictures or sounds to stimulate commenting on specific issues. The key feature of the projective technique is its ability to indirectly encourage the respondents to yield concealed information on issues, which they are otherwise unaware of their existence (Executive Solutions 2004). This feature fits perfectly with the use of the models (the theoretical and the Welsh best practice) as projective instruments to enhance the special events practitioners transferring their tacit knowledge on cultural special events management into explicit knowledge; bearing in mind the fact that:

> *Tacit knowledge cannot quickly migrate, i.e. it cannot be transposed to other firms, because the knowledge depends upon specific relationships (e.g. between colleagues) and because unlike knowledge of a computer code or a chemical formula, it cannot be a clearly and completely communicated to someone else through words or other symbols.*
>
> (Badaracco 1991 cited Ambrosini and Bowman 2001, p.813)

Consequently, a tool was required to facilitate the transfer of knowledge from the tacit to the explicit sphere. This tool is the projective instrument (i.e. the theoretical and the Welsh best practice models). In this regard, the projective technique has been used twice in this research. First, the theoretical model was utilized as a projective instrument to enhance the Welsh practitioners transferring their tacit knowledge on the managerial procedures for managing cultural special events in Wales into explicit knowledge. Second, the Welsh best practice model was utilized as a projective instrument to stimulate the Egyptian practitioners' commenting on the Welsh model to put it into an Egyptian context.

Despite the wide use of the projective technique in clinical and forensic settings (Lilienfeld *et al* 2000) and being increasingly used in consumer research and marketing (Chang 2001), there is no evidence in the literature, to date, of the use of a managerial model as a projective instrument in research related to special event management.

8.6 Limitations

Four limitations concerned the researcher during the studying process.

First, despite the incremental interest in researching special events management, which could be observed through the plethora of the specialist journals, conferences and academic studies, it could be argued that there is an evidential lack in researching some areas. Up till now, researches in special events management, especially those related to journals and conferences, seem to concentrate more on specific aspects including profiling festivals, the special events' impacts notably the economic direct impacts, sponsorship, volunteerism, hosting communities' and customers' perceptions. On the other hand, certain areas such as implementation and evaluation were less recognized; while areas such as the catalyst's role, ideas selection, decision-making, staff structure and modelling the managerial procedures were almost neglected in special events research.

Second, exploring the current literature on special event management reveals an approach of generalization when exploring the special events management without considering the dissimilarities, which emerge amongst them in reality. However, more attention should be paid for dissimilarities such as the special event activities (e.g. cultural, sport) and size (e.g. local event, major event, mega event), and how such dissimilarities might obligate changes in the managerial procedures applied when managing different special events.

Third, the study provides a potentially applicable model and guide for managing cultural special events in an Egyptian context. However, a practical application of both the model and the guide may help explore new problematic areas in the Egyptian cultural special events management. Thus, a careful observation is definitely required over several years of application to evaluate the practical application of the model and the guide in Egypt and to suggest more modifications in order to adapt these potentially applicable model and guide into an Egyptian best practice model and guide.

Finally, as in the management of other activities (e.g. tourism), special events management has political, social and wider economic dimensions dependent upon its regional, national and local context, which are external factors that might influence cultural special event management. However, a pure managerial approach was adopted in the design of this study for the development of a model applicable to the management of cultural special events in Egypt. A high level of abstraction was deliberately adopted for this study to enable the development of a generic framework for cultural special events management. Working at such a high level of abstraction and using a management focus allowed the political, social and wider economic dimensions to be 'bracketed' out of the model. In discussion with the event practitioners in Egypt it was very obvious that if one were to reduce the level of abstraction the national context provides a very different political context for cultural special event management than that experienced by the Welsh event experts. Such differences would impact on the detail of how the different managerial elements in the model would be deconstructed and operationalised. However, these issues were beyond the scope of the current study. To explore the impact of these dimensions on specific elements of the cultural special events management model is something that I would like to explore in post-doctoral work. The influence of political and social factors, for example, on attitudes towards volunteering for cultural special events management is an area which my own experience in the supervision of student 'volunteers' in the management of the Aida concert at the Pyramids tells me would be a fruitful area of study. Hall (1992) comments on the noticeable worldwide shortage of research into the political dimensions of special event management.

8.7 Opportunities for future research

Special events management research is still in its infancy, thus it is still extensively accessible for more studies concerning several areas. However, it is not only the infancy of the special events management, which is promising for future possible research but also the special events' extended relationships with areas such as tourism and leisure management, sociology, culture, sport, history, economy, politics and arts which all offer a large range of interrelated studies. The major opportunities for future research include several ideas.

Special events research and texts neglect the internal dissimilarities between the special events in relation to issues such as their activity (e.g. cultural, sport) when investigating the procedures required for managing them. This thesis discussed the managerial procedures for managing cultural special events. However, it is uncertain whether the same procedures can be applied when organizing sport events, for example, or changing the event activity obligates changing its managerial procedures, as well. The same question rises regarding the event size (e.g. special events, hallmark) and event aims (e.g. social, political). Thus, researchers are recommended to explore whether or not changing the event activity, size or aims necessitate changing its managerial procedures.

The thesis discussed the suggested model as a tool for managing cultural special events. More research is required to test the applicability of using the model as a device for training purposes; or as a benchmarking tool for improving special events management through the comparison of the different practical models of several special events.

A key contribution of the study is suggesting a potentially applicable model and guide for managing cultural special events in an Egyptian context. However, the evaluation of the applicability of these model and guide require several years of careful observation in order to modify these potentially applicable model and guide into best practice model and guide for managing cultural special events in an Egyptian context.

As with many other areas (e.g. tourism) special events researchers focus more on examining the special events' positive social, cultural, economic and political outcomes. However, like any other activity, special events have their drawbacks. For example, aiming to attract more visitors to attend the cultural special events, the Museum Of Welsh Life, planned at certain time, to insert less traditional features (e.g. regarding timing and activities) to some of its cultural special events. The same could be expected when targeting international visitors, for example, where modifying the original idea, time or activity of a certain cultural event may be necessary to draw the attention of such segments. Thus, it might be recommended exploring the cultural cost of hosting cultural special events. Other prices (e.g. social prices) could also be paid in case of hosting mega sport events, for example (e.g. congestion, inconvenience).

8.8 Personal reflections

In reflecting on the relativist stance adopted in this study, I can see that there is a tension between the adoption of a relativist stance, which basically boils down to "*it depends* ... [on context]", and any attempt to present a single model representing cultural special event management in a Welsh and Egyptian context. The objectives listed in chapter one clearly differentiate between the development of a Welsh best practice model and the development of a model applicable in an Egyptian context. I would defend the adoption of a relativist stance as emphasising the importance of being open to the possibility of differences in approach to cultural special event management in Egypt as compared to Wales. Indeed, the models developed for Wales and Egypt were different, albeit only subtly, at the level of abstraction adopted and the similarities in approach to cultural special event management overwhelmingly outweighed the differences. The differences identified related to the role of the government in event catalysis and the ordering of activities, i.e. the initial financial study and forming the initial features (which related to issues associated with the funding of events), in the decision phase. However, it was very obvious that if one were to reduce the level of abstraction the detail of the operationalisation of cultural special event management would be very different in both contexts and would be significantly influenced by political, social and economic dimensions. However, due to the level of abstraction adopted in this study such differences were effectively bracketed out. However, this does not, in my opinion, make a relativist stance any less appropriate.

In conclusion, this study is the result of a four-year research effort, which was dedicated to developing a potentially applicable model for managing cultural special events in an Egyptian context and a guide for managing the Egyptian problem areas. In this respect, the researcher hopes that the study will, help enhance the Egyptian special events organizations' ability to manage cultural special events; and will be employed for academic purposes in the Egyptian tourism, hospitality and leisure management colleges. In addition, the researcher hopes that besides the study contribution to both the practical and academic fields, it will also draw the Egyptian researchers' attention to dedicate more research effort in investigating a promising area, which has only been researched in Egypt once before (i.e. Sa'ad 2000).

I should record that this study has added deeply to my knowledge and research ability. Firstly, it broadened my knowledge regarding some areas, such as special events, with which I have been previously familiar. Secondly, it allowed me to consider issues, which I would never have otherwise explored, notably in relation to the research philosophical stance and to the use of both the Delphi and projective techniques, which are rarely utilized in the Egyptian research. Thirdly, it also helped me acquire new experience and knowledge regarding the research process itself and the scheme of conducting and supervising research; experiences, which I am eager to transfer to my Egyptian colleagues and students.

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CULTURAL

SPECIAL

EVENTS

MANAGEMENT:

AN EGYPTIAN GUIDE

TO BEST PRACTICE

PREFACE

This draft guide to cultural special events management has been developed to make explicit best practice in cultural special events management. It is aimed at cultural special events managers and is intended to be a straightforward guide to best practice.

It was developed as part of a research project at the University of Wales Institute, Cardiff and has resulted from interaction with cultural special events managers in Wales (Llangollen International Musical Eisteddfod, May Fair Festival at St. Fagans, and the Urdd Eisteddfod) and in Egypt (Nile Bounty Festival, Ismailia International Folklore Festival and Aida Opera Performances at the Pyramids).

Thanks are due to these managers who gave freely of their time. I am hoping that you will find the guide useful and that you will give me feedback so that the guide can be revised and a final version produced.

Thank you, in anticipation of your feedback.

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INTRODUCING THE BEST PRACTICE GUIDE

The best practice guide covers topics in relation to cultural special events management and comprises:

Section 1: Annual best practice managerial model 4

Section 2: SMART objectives 7

Section 3: Initial financial study 9

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Section 5: Market research 13

Section 6: Outcome evaluation 16

SECTION 1: An annual best practice model for cultural special events management

An annual managerial model is presented to provide an overview of the best practice procedures for managing cultural special events. The model was developed from a performance management model and is designed to facilitate the incremental enhancement of best practice.

The model provides a unified framework for a systematic identification and deconstruction of four major stages of event development, namely: decision; detailed planning; implementation; evaluation. The unified model has been through several rounds of intensive discussions with cultural special events' managers in both Wales and Egypt, and represents a consensus on best practice (Figure 1).

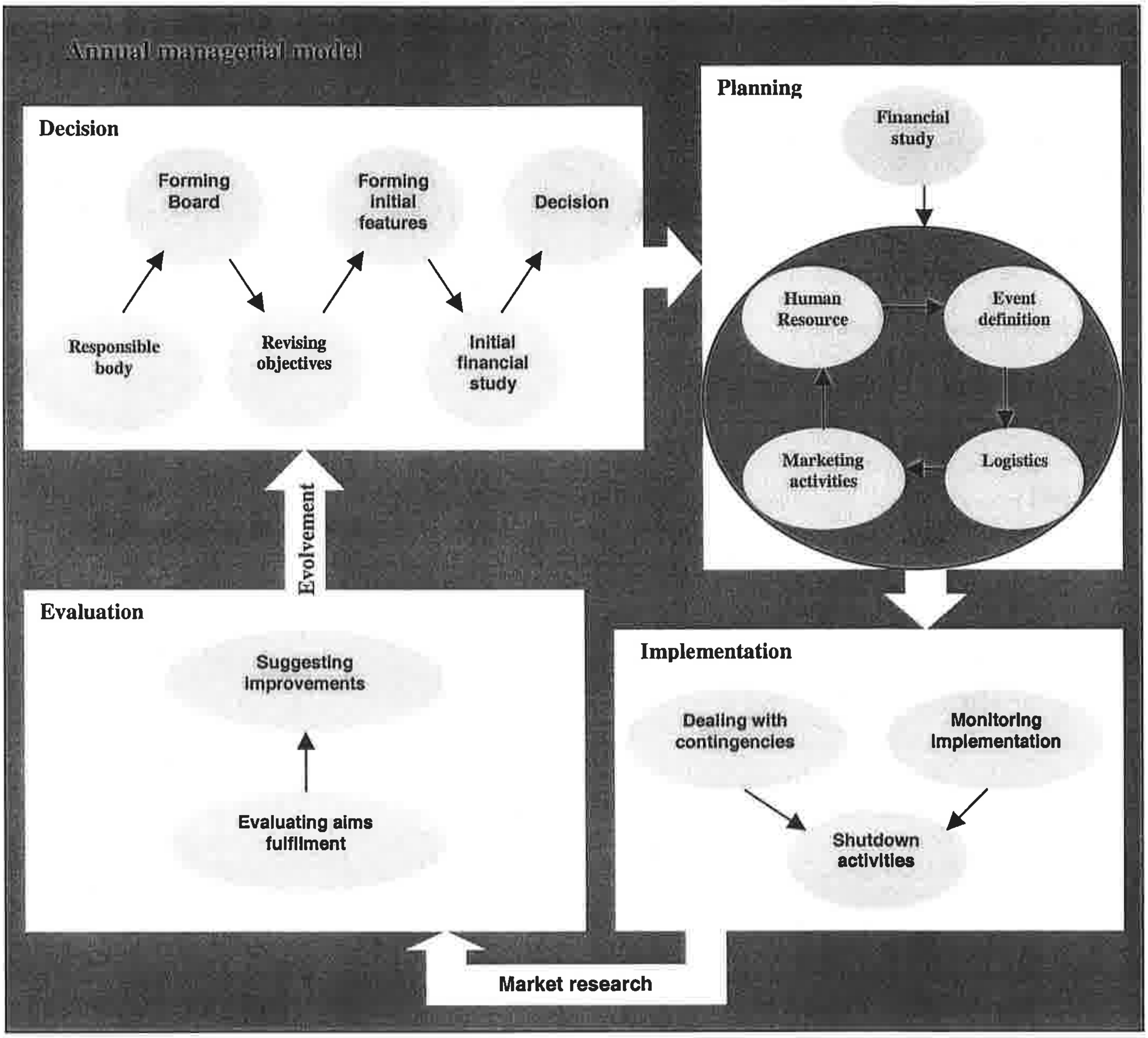

Figure 1: Potentially applicable model for managing cultural special events in an Egyptian context

The annual managerial model comprises four phases:

Decision phase: the decision phase generally comprises five distinct activities: establishing the Management Board; revising SMART objectives (see section 2); forming the event initial features, outlining the initial financial study (see section 3) and decision-making. The purpose of the decision phase is to help event managers justify their decision about whether the event should go ahead or not. It also provides them with the required data for planning the events in an effective manner and assisting the achievement of event aims.

Detailed planning phase: this phase is the most time-consuming stage in the event management process as it includes most of the work. In the detailed planning stage the event management team will break down the planning into five activities: a detailed financial study; event product definition; human resource management, marketing and event logistics. Sufficient time needs to be allowed for detailed planning (see section 5).

Implementation phase: following the detailed planning phase the event managers should have a complete plan for the implementation of the event. Work in the implementation phase involves monitoring the event against the plan and dealing with contingencies before the event concludes with shutting down activities.

Outcome evaluation phase: this phase determines whether the event has met its aims or not and enables the event management team to learn from the previous event experience about how the event could be done better on subsequent occasions (see section 4). Six different perspectives are important in evaluating the event outcome: the event organization, volunteers and other staff, event sponsors, customers, community and environment.

SECTION 2: SMART objectives

2.1 What does SMART mean?

The event aims need to be clearly defined in terms of SMART objectives. The acronym SMART stands for specific, measurable, achievable, relevant and time-bound.

Specific: means that the desired outcome is described precisely, giving details as far as possible about what is to be achieved. Expressing the objectives using action verbs helps make them specific (e.g. to increase, reduce, earn).

Measurable: quantifies the objectives and allows assessment of failure or success (e.g. 10%, 1000 tourists).

Achievable: means that the objectives can feasibly be realized within the available human and financial resources. Achievability should not contradict with the objectives being ambitious.

Relevant: the objective is consistent with the event aims and complements the nature of the event.

Time-bound: specifies when the required outcomes will be achieved (e.g. the event final day).

Thus, SMART objectives describe the event's ultimate targets in a detailed measurable manner. SMART objectives are key to effective event management, and are particularly important in the event evaluation process.

2.2 Writing SMART objectives

Forming SMART objectives is likely to go through a two-step iterative process. Ideally, key staff members will be involved in the process to ensure that the final objectives are owned by the whole management team.

Step one: Writing SMART objectives:

1. List the event aims.
2. Identify the objectives that contribute to the achievement of each aim.
3. Express each objective using an action verb and identify what to be done and by whom to make the objective specific.
4. Quantify each objective to make it measurable.
5. Consider the resources that will be required to achieve the objective. Thus, revise the objective to make it achievable regarding the event availabilities otherwise you should secure more resources.
6. Ensure that the event is relevant to the event nature.
7. Ensure that an appropriate timescale and a specific completion date are identified for each of the event objectives.

Step two: Confirming consensus on SMART objectives

1. Ensure that each member of the Management Board and the senior staff members including the senior volunteers, especially those with long experience, are given the opportunity to comment on the objectives.
2. Revise the objectives appropriately in the light of the comments.
3. Check the agreement of the Management Board and the event management team with the revised objectives.
4. Disseminate the final objectives amongst all key staff members and the related entities; and ensure that they all understand the objectives clearly.

Once the SMART objectives have been agreed and disseminated, each member of the management team should be invited to develop an action plan for his/her area of responsibility. With a managerial team consists mainly of volunteers, setting the action plan is preferably to be jointly undertaken with a professional staff member (e.g. the event executive manager), who has an overview of the proper discipline, within which work should be done. The action plan will link the SMART objectives to specific members of the staff who will undertake the requisite actions.

SECTION 3: Initial financial study

Indication of the potential financial situation is a key factor when deciding if the event will go ahead or not. It is best to identify early if the event is not going to be feasible so that plans can be amended. Early discovery of the lack of financial viability of the event will save money, time and effort that might otherwise wasted. If in doubt about actual costs slightly overestimate the expenditure and slightly underestimate the income. The initial financial study comprises three steps:

Step one: Identifying and estimating income sources

1. List all the potential income elements.
2. For a recurring event, use the event previous balance to estimate the potential income of each element.
3. Revise the potential income of each element regarding any changes in the influencing factors such as the volume of conducted promotion, the activities provided and the internal, regional and international political and economic circumstances.
4. For a new event, use the data revealed from the market research besides the organizers' experience to assess the potential income of each element.

Step two: Identifying and estimating cost elements

1. List all the potential cost elements.
2. For a recurring event, use the event previous balance to estimate the potential cost of each element.
3. Revise the potential cost of each element regarding the current changes in the influencing factors such as the national inflation rate and its effect on prices; any suggested improvements concerning the event activities.

4. For a new event, collect primary data about the prices besides the organizers' experience to assess the potential cost of the each element.
5. Add an element for contingencies; this is usually between 5 to 10% of the total expected costs.

Step three: Reviewing and decision-making

1. Revise all the steps you did to ensure not missing or miscalculating any item.
2. Develop a draft budget and forward it to the Management Board and the senior staff members.
3. Ensure that each member of the Management Board and the senior staff members is given the opportunity to comment on the budget.
4. Revise the budget appropriately in the light of the comments.
5. Report the new budget to the event organizers.

As a result of the predefined fund available, the overall amount of income on hand is likely to be considered before investigating the cost aspects. Or in other words, expenses are likely to be estimated in the light of the potential fund on hand.

SECTION 4: Chronology of detailed planning regarding promotion

Assuming that event management is an annual iterative process, evaluation of the previous event will feed smoothly into managing the next event.

The first two months after the previous event will focus on forming the Board, revising the SMART objectives, forming the initial features, doing the initial financial study and decision-making. The planning phase is the most time-consuming phase and is likely to extend for six to eight months leading up to the event implementation. The planning months will focus on conducting detailed financial study before moving to simultaneously plan marketing, human resource, event features and logistics. The implementation period will vary depending on the event features, where both monitoring implementation and dealing with contingencies will be the main duty. Then, another week is usually dedicated to shutting down activities. Finally, one to two months will ideally be devoted to evaluation.

Most of the managerial activities will fall into the annual management routine. However, promotion needs specific consideration, as timing has a key role to the effectiveness of promotional activities. Events usually target specific market segments and different promotional channels are often for promoting the event to particular market segments. The marketing plan is likely to identify a range of promotional channels, e.g. newspapers advertisements, posters, billboards, Internet. Each of these channels will require a different lead-time to maximize its effectiveness. It is important to allow sufficient response time. It is also important that if telephone numbers are provided for ticket sales that these are manned from the time of publication.

Promotion timing is mainly defined depending on targeted market features (e.g. local, international) and, of course, the combination of the event both promotional potential costs and budget available. Timing differentiates as well depending on the promotional tool utilized. Table 2 illustrates the ideal timing required for each promotional channel in terms of the targeted market.

Targeted group	Promotional channels	Timing
National visitors	Posters Newspapers ads. Press releases Media ads. Media releases Leaflets Internet	Two to eight weeks Three to four weeks One month One to two weeks One to four weeks Two to eight weeks Continuous updating
International tourists	Posters Newspapers ads. Press releases Media ads. Media releases Leaflets Internet	Two to three months Not utilized Not utilized Two months Two months Three to six months Continuous updating

Figure 2: suggested timing for each promotional channel in terms of the targeted market.

The available budget and the event history and novelty (i.e. is it a first-time or a recurring event) are the main factors influencing the precise timing of utilizing each promotional tool.

Finally, leaflets, posters, newspapers adverts and releases can be produced a long time ahead of the event date (e.g. more than a year in advance). These can include general information about the event, even if some of the event features were not confirmed yet (e.g. the event ultimate activities or timetable). The aim of the initial promotional releases is to draw the potential customers' attention well ahead of the event to give potential visitors time to plan their trips, especially in case of targeting international tourists.

SECTION 5: Market research

Market research is vital for special events as its outputs provide a robust foundation for decision-making and detailed planning. Market research for existing events is a fairly straightforward process and a lot of data is likely to have been collected during the evaluation phase of the previous year's event. New events are likely to depend more on secondary data collected from previous similar events; nevertheless, random approaches could be used (e.g. ACORN Sampling[1], Hall Test[2]). Market research comprises seven steps.

Step one: Defining the data required

1. Invite each member of the event management team to define the data they need to do their work effectively.
2. Collate all the requisite data from each area to give a total picture of the data required.

Step two: Collecting secondary data

1. Consider which data can be got from secondary sources. This will save you money, time and effort.
2. Evaluate the reliability of secondary data and how relevant it is to your event scenario.
3. Check if obtaining the secondary data requires permission from the data owner. If yes, contact them to get permission.

Step three: Collecting primary data

1. Identify the resources, which are available to undertake primary data collection in terms of the budget, time and staff available.

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[1] A Classification Of Random Neighbourhood where the researcher is given a random address to start from before moving according to specific predefined directions.

[2] A random test, where individuals are invited randomly from streets into rooms to participate testing a product, a promotional method, etc.

2. Review the primary data to be collected in the light of the available resources.
3. Identify exactly what data is required and the people who can provide you with the data require (e.g. potential customers can tell you how much they would be prepared to pay for an entrance fee; the police would be able to talk to you about traffic flow and car parking arrangements. Give as much detail as possible.

Step four: Defining the data collection method

Primary data for market research is generally collected by one of three methods: survey, interview or observation. Each method has its advantages and disadvantages (see table 1).

Method	Advantages	Disadvantages
Surveys	• Inexpensive • Easily analysed • Good for large sample size • Can be done within short time • Good for contacting busy people • Provides comparable data • Usually, results in better response rate	• May result in low response rate if poorly administrated • Does not give opportunity for the participants to expand on particular issues or to use their own words.
In-depth interviews	• Good for getting rich qualitative data • Encourages participants' reflection • Enables obtaining detailed data on specific issues	• More expensive • Lengthier preparation • Reduces sample size
Observation	• Provides better understanding of activities in context. • Records things that participants may have ignored or be unwilling to share. • Provides direct experience.	• Data may not be directly comparable • Organizers have no control on the process

Table 1: primary data collection methods

1. Identify which method is the best to collect the data you require and the availabilities you have.

Step five: Planning the data collection

1. Develop the question schedule for data collection. Be specific. Do not put in irrelevant questions in order to keep the list of questions and the time required for completion as short as possible.

2. If using surveys, define which type of sampling will you apply. The sample should r epresent, as far as possible, the whole targeted segment.
3. Define the suitable time, which helps the interviewees contributing effectively. Conducting surveys in the event site, by the end of the event is preferable, if the survey is short (e.g. takes 5 to 10 minutes) as it is likely to resulted honest answers (i.e. the interviewees remember what they have been seen and are still upset about what went wrong); otherwise, incentives are likely to be offered, if the interviewees will fill the survey at home.
4. If using interviews, define the criterion according to which the interviewees have been selected.
5. Contact the interviewees to arrange interview slots in an appropriate location.
6. Consider piloting the data collection, especially for a questionnaire survey to ensure that the questions are clear and unambiguous.

Step six: Fieldwork

1. Ensure that staff understand the data collection requirements and are trained before starting the fieldwork.

Step seven: Analysis and conclusion

1. Analyse the data and present it in a way that is meaningful to the management team.
2. Report the results to the management team.

It might worth noting that the event practitioners repeatedly identify marketing and market research as the most frequent area, where professionals are sub-contracted by the event management team.

SECTION 6: Outcome evaluation

Outcome evaluation is vital for assessing the fulfilment of event objectives. Through the evaluation process you will be able to identify what went well and what went badly, identify opportunities for enhancement of future events. Outcome evaluation goes through two-step process.

Step one: Evaluating the achievement of the event's objectives

1. List the event objectives (e.g. to attract 5000 French tourists).
2. Define the closured data required for assessing the objectives' fulfilment (e.g. data on the number of visitors and their nationality).
3. Obtain the required data (e.g. ticket sales analysis or applying a survey at the end of the festival).
4. Compare the data with the event objectives to assess whether they have been achieved or not.
5. If all or some of the objectives have not been fulfilled, ask "why". Try to find detailed explanations to find out why.

Step two: Suggesting improvements for the following events

1. Inform staff that they must report any problems they experience as they occur and define precisely to whom they should report.
2. What went wrong? Ask staff to list the reasons that they felt caused each problem and then get them to suggest how these problems could be avoided in the future.
3. What went well? Ask staff to identify the things that went particularly well and to suggest any ways to make them even better.
4. Ask long-term volunteers to report their comments, as well, as they will likely be more able to identify positive or negative trends in the event from year to year.

5. Put comments forms in an appropriate location (e.g. at the setting halls, by the exit doors) and encourage the public (e.g. incentives) to provide their feedbacks.
6. List the suggested solutions and improvements and report them to the Management Board.

Learning from the similar events is another key method for acquiring new experiences and suggesting new improvements for the event. Attending other events, as participant observers will provide the events' organizers with an idea of what events feel like from an attendee's perspective.