

EVENT PORTFOLIO DESIGN:
EXPLORING STRATEGIC APPROACHES TO MAJOR EVENTS
IN NEW ZEALAND

VLADIMIR ANTCHAK

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In memory of my grandmother Anna (1923-2013)

You were my first friend and mentor. Your smile is always with me...

Abstract

One of the strategies which is increasingly applied by cities across the world in an everlasting desire to promote and capitalise on their competitive identity, is the hosting of large-scale events of different genres. In an attempt to become an attractive event place, many cities have progressed from a random and eclectic choice of events toward the development of portfolios of events.

Despite the increasing popularity of an event portfolio strategy in the literature and among city event planners, there is a lack of developed theoretical concepts and empirical evidence in this area. To address this gap, a qualitative multiple case study research was conducted in three cities in New Zealand, namely Auckland, Wellington and Dunedin.

The thesis explores critical aspects of the portfolio programming. It analyses the rationale behind utilising major events, strategic portfolio approaches, compositional structures of the portfolios in the cities, roles that events can play within a portfolio, design factors that influence events programming, and the development of an overall portfolio synergy.

The research is grounded in critical realist ontology and pragmatist epistemology. Critical realism helps to uncover a reality of processes that determine portfolio design. A portfolio of events exists in a real context. It is shaped by real processes of planning and decision-making. Pragmatist epistemology directs this research in two ways. Firstly, pragmatism calls for the application of an action-oriented approach. The research becomes a resource for informing human practices and suggesting possibilities for solving problems in the field of planned events. Secondly, pragmatism admits context-dependence of knowledge. Thus, the research serves as an important source of valuable insights, rather than a cradle of a universal truth.

The research methods included semi-structured interviews with event planners from the city councils' departments and relevant council controlled organisations responsible for major events programming. Related public documents were also analysed to complement the emerged insights from the interviews. Thematic analysis of the collected data was carried out to identify and analyse key research themes.

The thesis revealed an interplay of four processes in portfolio design that determine its nature, rationale, compositional variety and synergetic values. These are *Imagineering*, *Approaching*, *Composing* and *Synergising*. *Imagineering* directs the creation of a general vision on major events and their role in the construction of a desirable place identity.

Approaching guides the elaboration of a strategic framework to utilise major events in accordance with the stated objectives and expected outcomes. Composing focuses on the compositional structure of event portfolios. Synergising is responsible for the maintenance of an overall balance in a portfolio.

The findings of the research make an important contribution to event studies and event portfolio theory. The thesis advances an understanding of the strategic role portfolios of major events play in city development. The research offers new perspectives on portfolio design problematics and uncovers critical aspects of the design 'technology'. Practical implications of the research relate to public event strategy and policy development, portfolio approaching forms and strategic event management within urban contexts.

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Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.



Vladimir Antchak

Ethics Approval

As one of the data collection methods in this research was interviewing of human participants, ethical approval was required from Auckland University of Technology's Ethic Committee (AUTEK). The formal ethic application 14\213 was approved by AUTEK on 15 August 2014.

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To my son, Chiro. Thank you for your patience. Now I am ready for a good shooting game... ☺

List of Abbreviations

AC	Auckland Council
AEP	Auckland Events Policy
AMEP	Auckland's Major Events Protocol
AMES	Auckland's Major Event Strategy
ATEED	Auckland Tourism, Events and Economic Development
AUTEC	Auckland University of Technology Ethics Committee
CAQDAS	Computer-assisted qualitative data analysis software
CCO	Council Controlled Organisation
DCC	Dunedin City Council
DFES	Dunedin Festival and Event Strategy
FIFA	Fédération Internationale de Football Association
KPI	Key Performance Indicator
MEDF	Major Event Development Fund
NMES	National Major Event Strategy
QBL	Quintuple Bottom Line
ROI	Return On Investment
RRI	Return on Regional Investment
TBL	Triple Bottom Line
UNESCO	United Nations Educational, Scientific and Cultural Organization
WCC	Wellington City Council
WEP	Wellington Event Policy
WEP	Wellington Event Policy
WREDA	Wellington Regional Economic Development Agency

Chapter 1: Introduction

This chapter lays the foundations of the research. The following subsections introduce the background of the study and set the context of the research. The chapter outlines the research question, aim and objectives of the thesis. It also introduces the research methods and key applied definitions. The chapter concludes with the outline of the thesis's structure and a brief description of the chapters.

1.1 Background to the research

In today's competitive world with a rapidly changing economic environment, cities have to proactively implement different strategies in order to resolve an array of economic, socio-demographic, technological, and ecological challenges. The conflicting courses of globalisation and localisation are influencing the development of urban policy at the same time. On the one hand, cities should meet global standards if they are to attract new investment, business, skilful workforce and tourists; however, on the other hand, distinctive local identity is a pivotal element of competitiveness in the global market (OECD, 2007). This strategic dilemma prompts cities to employ a set of policies to achieve a balance between these two distinctive ways of development. Different cities have tried to position themselves as entrepreneurial, creative, or intercultural cities (Richards & Palmer, 2010) with an imperative to showcase and promote their unique urban identity worldwide (Magala, 2011).

One of the strategies that has been increasingly used by cities is the hosting of large-scale events of international significance with a high media profile (Clark, 2008). Over the last two decades, there has been a remarkable intervention of major events into government policies and city development strategies. Events have become an integral part of social, cultural, and tourism agendas in cities across the globe (Getz, 2013). Major events have been re-envisaged as boosterist strategies to mitigate contemporary urban problems caused by global economic changes (Foley, McGillivray, & McPherson, 2012a). Moreover, events are capable of instigating the transformation of cityscapes, add life to streets, catalyse the redevelopment and revitalisation of urban areas (Balsas, 2004; García, 2004; Smith, 2009). Entire cities have been transformed into event stages where an array of different events is performed (Richards, 2015a). Every city tries to market itself to local residents and visitors using large-scale events as means for the attraction of attention and image promotion (Richards & Palmer, 2010).

The main issue that currently has been affecting cities' competitive approaches, and event strategies in particular, is that many of the cities have been 'trapped' by a 'serial reproduction' method when the same tactics and strategies have been implemented in distinctive places without any analysis of their applicability and usefulness (Richards & Wilson, 2006). The creation of more or less similar urban designs, tourism attractions or event programmes leads to the substitutability of the offerings and, as a result, to the reputational and image stagnation (Moilanen & Rainisto, 2009). Effective urban development and successful competition require a solid mobilisation of the available resources, public diplomacy and a wide range of stakeholders, all united around a clear vision of what their city is, where it is going and what strategies will increase its reputational status and competitive identity (Anholt, 2010).

In order to maintain a distinctive urban individuality and develop a competitive programme of events, a new strategic approach is required. It is not enough simply to host discrete events in a hope to anchor market attention, attract crowds of visitors and satisfy the expectations of the local residents. As recent research suggests, separate events can make international news, but they are hardly capable of affecting people's beliefs about the host city (Anholt, 2007). The key solution in this case is to learn how to use events proactively in order to achieve long-term positive results for the host city (Richards, 2015a). A well-developed event strategy that takes into account different perspectives and city objectives can facilitate the integration of events into the urban life. Smith (2012) argues that events are most successful when they assist and accelerate the achievements of already existing city goals. 'Eventfulness' is a term that describes the integration of events with other strategies and policies in a city, such as tourism, economic, social and cultural development, urban regeneration, and brand promotion (Richards & Palmer, 2010). The concept of an 'eventful city' entails a holistic approach to purposeful use of events to support the development agenda of a city and enhance its attractiveness and liveability (Richards & Palmer, 2010).

The planning and development of a portfolio of events can be viewed as an opportunity to embrace all of the issues discussed above. A portfolio of strategically grouped and managed events could be able to bring a range of benefits, including spreading of risks across many events, sharing costs and transferring knowledge from one event to another (Ziakas, 2014a). The portfolio approach emphasises the shift from a supply-side to a demand side approach in urban event development, where competitive advantages of a place accrue from a strategic alliance of events with city resources, city aims, and overall

host community capacity and capability (Getz, 2013). It is argued that the process of attracting, developing, and staging events should be conceived in terms of sustainable place making, which refers to “goals that are of obvious symbolic, civic and social interest and open new opportunities for urban development” (Palermo & Ponzini, 2015, pp. 19-20). This includes socio-cultural, economic, sport and tourism development, urban regeneration and brand promotion and, shaped by the integrated strategic planning, setting common policy purposes for a host destination (Ziakas, 2014b).

The event policy domain places events on the macro-level contextualisation, exploring the prerequisites and effects of an event-led policy in cities (Foley et al., 2012a). Events that are planned to deliver specific outcomes and achieve clear goals, set by a host city, require a strategic managerial approach where all the interested stakeholders align their goals and behaviour to a common strategy (Getz, 2013). This unity of intention can be achieved by implementing an event portfolio approach, directed by an underlying event strategy or policy. The design of an event portfolio constitutes the most important stage of the realisation of this process. Critical factors (e.g., local resources, market demand, competition between events) and decisions that influence the compositional structure of a portfolio (e.g., frequency of events, calendar placement, and total number of events in a portfolio) should be taken into consideration (Ziakas, 2014b). A set of strategies that utilise events for clear purposes (e.g., tourist attractions, catalyst for urban re-development) should be formulated (Getz, 2012b). Leveraging and cross-leveraging strategies should be planned in order to further positive outcomes from staging events, complement and reinforce events across a portfolio (Ziakas, 2014a).

Overall, event portfolio becomes one of the key concepts in the strategic planning of events in a city or event destination. There is a growing need to explore the patterns and aspects of the portfolio design and its long-term impacts in different locations within diverse contexts. The following section explains the rationale for selecting New Zealand as the geographical location for this study.

1.2 Setting the context of the research

New Zealand represents a promising location for the exploration of event portfolios and their design patterns. For the past two decades, New Zealand, a relatively remote in geographical terms country, has been actively communicating with the international visitor market in order to construct a global brand for the country. Tourism and major events have been widely recognised as the most powerful and successful instruments that

brand countries directly to the target audience (Anholt, 2007). The ever-increasing numbers of international event visitors to New Zealand, as well as recent success in securing bids for such large-scale international events as 2011 Rugby World Cup, 2015 ICC Cricket World Cup, 2015 FIFA U-20 World cup and 2017 World Master Games, demonstrate the relevance of the established national strategies.

In line with the current world trend to use major events in order to increase global appreciation and remain a competitive destination, New Zealand has developed a strategic approach to major events, which can deliver significant economic and socio-cultural benefits to the nation. In 2004, the National Major Events Strategy (NMES) was developed. It presented an overview of a vision and key objectives for government involvement in major events. The government intended to occupy a central position in the national major event sector in order to achieve its goals for promoting sustainable economic development of New Zealand, its brand profiling and cultural development of the country (Cabinet Office Wellington, 2004). One of the key rationales behind this strategy was to establish market mechanisms that guarantee the support and delivery of the whole major event 'package', including a broad range of leveraging activities, which otherwise might not be realised because of the financial inability of an organiser to deliver it (Ministry of Economic Development of New Zealand, 2007). Overall, the key intention of the strategy was to clearly formulate and enhance the role of the government in attracting, retaining and growing major events. The strategy responded to the existing coordination, informational and funding issues in the national major events sphere.

The establishment of NMES and related Major Events Development Fund (MEDF) paved the way to the strategic use of events in the development and sustention of the prosperity of New Zealand. Major events became a recognised and approved tool to deliver economic and social value to New Zealand residents and related national industries. Since 2005, the government has supported 160 events and invested over NZ\$77.51 million (Ministry of Business Innovation and Employment of New Zealand, 2013). Recent analysis and evaluation reports suggest that major events prove to be a beneficial investment for the Government of New Zealand: meta-evaluation of 18 major events that received an investment from MEDF between February 2010 and April 2012 indicates an approximate return on investment (ROI) of 96% and NZ\$32.1 million of net economic benefit (Ministry of Business Innovation and Employment of New Zealand, 2013). The data emphasise the strategic importance of hosting events that are capable of generating high numbers of international visitors and, as a result, high levels of tourism related

income, promotion of the country's image abroad and a high event destination profile (Ministry of Business Innovation and Employment of New Zealand, 2013). Importantly, the Government has emphasised the necessity of implementing a portfolio approach to major events, where the overall balance of the events' criteria and their potential outcomes should be planned and measured taking into account the contribution of the whole programme, and not of separate events (Ministry of Economic Development of New Zealand, 2007).

The research was conducted in three cities: Auckland, Wellington and Dunedin. The cities have a 'core' national status (Ministry of Business Innovation and Employment, 2012) in terms of economic, political and socio-cultural share, and represent a variety of different contexts. The methodological rationale for selecting these particular locations is explained in Chapter 3. The general description of the cities is presented below.

Auckland is located in the North Island of New Zealand. It is the largest urban area in the country. The city has a population of 1,415,500, which is more than 30% of the total population of the country (Statistics New Zealand, 2013a). It contains around 190 ethnic groups and can be called "the population portal for New Zealand" (Neill & Shirley, 2013, p. 184). The city has a higher proportion of people of Asian origin than the rest of New Zealand - 23.1% (Statistics New Zealand, 2013a). Auckland is New Zealand's principle business centre; most major international corporations have an Auckland office. The city accounts for 35.3 per cent of New Zealand's GDP and is a major national gateway for imports and exports (Statistics New Zealand, 2014). It is the most visited tourist destination in New Zealand, attracting 72 % of all visitors to the country (*Tourism sector: Bold plans for a thriving industry*, n/a). Today, Auckland is envisaged as a modern city with a high quality of living, which is recognised in different international comparative studies such as Mercer Quality of Living Survey, where Auckland was ranked the third most liveable city in the world (*Mercer quality of living rankings*, 2015). Lonely Planet named Auckland one of the world's Top 10 Cities in 2014 in its 'Best in Travel' guide (*Lonely Planet's best in travel 2014: Top 10 cities*, 2014).

Wellington is the capital of New Zealand and the main city in the greater Wellington region. The region is the third largest in the country in terms of population, with 471,315 residents: 11.1 % of the total national population (Statistics New Zealand, 2013d). Wellington City's total population is 190,959 residents with 77% being of European ethnic origin (Statistics New Zealand, 2013c). Geographically, the city is located at the

south-western edge of the North Island. The city houses the national Parliament and the head offices of Government Ministries. It is an important centre for creative industries, including the film and theatre industry. Wellington is home to the country's major arts and cultural institutions such as Royal New Zealand Ballet, New Zealand Symphony Orchestra and the National Museum of New Zealand, Te Papa Tongarewa. Wellington has been positioned as the 'coolest little capital in the world' and 'a smart capital' (*The coolest little capital in the world*, n/d). Lonely Planet Best in Travel 2011 ranked Wellington as fourth in its Top 10 Cities to Visit in 2011 (*Lonely Planet's top 10 cities for 2011*, 2011). In 2014, Wellington was named the 12th city of the best quality of living in the world by Mercer (*Mercer quality of living rankings*, 2014).

Dunedin is the second largest city in the South Island of New Zealand. It is located on the central western coast of the Otago region. The population of 120 249 residents ranks it 5th in size out of the 67 districts in the country. This represents 2.8 percent of New Zealand's total population. 83 percent of residents belong to the European ethnic group (Statistics New Zealand, 2013b). The city's primary industry is tertiary education, housing the University of Otago and Otago Polytechnic, and students represent 21 per cent of the city's population. It is the oldest New Zealand city with a rich Scottish legacy. Dunedin is also a UNESCO creative city of literature and the 'heritage capital' of New Zealand.

1.3 Aims and objectives of the research

Nowadays, many cities across the world, and in New Zealand in particular, have been actively planning and implementing an event portfolio approach. However, limited empirical research has been undertaken in this area. As Ziakas (2014a, p. 183) points out, the research on event portfolios "is currently at an early, or even an embryonic stage of development". Until recently, several authors (e.g., Chalip, 2004; Getz, 2013; Richards & Palmer, 2010; Smith, 2012; Ziakas, 2014a; Ziakas & Costa, 2011a) have touched upon the concept of event portfolio, mainly in conjunction with the assumptions on how to gain a range of economic, business, tourist and social benefits from a series of pre-selected events. Some empirical explorations of the nature of an event portfolio and its compositional structure have been conducted by Ziakas (2014a) and Clark and Misener (2015) in small rural and urban communities.

A limited number of empirical studies on the diversity of event portfolio configurations in different national and urban contexts, their design patterns and implementation

strategies, sets forth a number of questions regarding event portfolio's rationale, planning, and management. This study aims to address this gap by exploring the phenomenon of major event portfolios within a New Zealand context. The research question of the thesis is:

How do city event planners in New Zealand design portfolios of major events?

The overall aim of this research is to investigate the complexity of major events portfolio design within different urban contexts, through the lenses of city councils and public agencies responsible for development and implementation of event strategies and policies. The thesis intends to explore the principles of planning and delivering major events in three cities: Auckland, Wellington and Dunedin.

To answer the research question and to achieve the overall aim of the study, four specific objectives have been formulated. The first research objective is broad and explores local contextual environment, including institutional arrangements and event policy frameworks in the selected cities:

Research objective 1: To understand the commonalities and differences in public sector institutional and policy contexts and their influence on the realisation of event portfolio approaches in Auckland, Wellington and Dunedin.

The second objective intends to uncover and explain the rationale for event portfolio development. Strategic vision on major events, place identity and place making through hosting major events are the key topics of interest:

Research objective 2: To identify the underlying layers of event portfolio planning in the three cities under study.

The third objective seeks to discover key components of portfolio programming in each of the selected cities. It focuses on the compositional strategies, design factors and overall portfolio integrity:

Research objective 3: To examine the key areas of event portfolio programming in the cities under study.

The fourth and final objective seeks to conceptualise the core processes of event portfolio design in the three cities. It aims to create a conceptual model that explains the complexity of portfolio development:

Research Objective 4: To develop a model and explain core strategic processes of event portfolio design in Auckland, Wellington and Dunedin.

Overall, these four objectives provide a platform for the structure of the thesis. They guide the data collection and analysis, as well as the discussion of the results of the study. Eventually, they deliver the response to the formulated research question.

1.4 Significance of the study

This study contributes to both theoretical and practical perspectives. From the theoretical perspective, the research is paramount as it contributes to the development of an event portfolio theory by providing insights into the planning and development of the portfolios of major events in the contexts of large and medium-sized cities. Though much attention in event studies has been focused on the portfolio phenomenon, the interpretations of the event portfolio design strategies in the literature are mostly descriptive and lack empirical evidence. Moreover, no research on the event portfolio problematics has been conducted in New Zealand. Thus, the results of this study will be utilised to develop a comprehensive theoretical foundation for event portfolio studies and to expand the existing frameworks and models.

From a practical perspective, the research meets the expanding interest of city event planners and other industry practitioners in New Zealand. In Auckland, major events have become a part of a wider economic development strategy, where they play a role of core pillars of the city's prosperity. Wellington is currently at the stage of formation of a similar approach to major events as key economic contributors. Dunedin is working on the redevelopment of its vision on major events and the ways events can contribute to the city identity. The thesis provides insights into the city event policies and strategies. It highlights the key aspects of event programming and offers a critical analysis of the key processes that shape the portfolio design. This leads to the development of practical recommendations for city event planners on how to strategically develop a programme of major events, which would highlight the distinctiveness of the event destination and emphasise its competitive points of difference.

1.5 Research design and methods

The thesis adopts a critical realist ontology, a pragmatist epistemology, and methodological principles of a multiple case-study research. Critical realism assumes that there is a reality 'out there' that is operated independently of observers. However, a

possibility of different valid perspectives on any real entity is accepted (Sayer, 2000). Objects of reality include physical objects, organisation, people, and relationships. The individual's ideas, meanings and feelings are treated equally to physical objects (Maxwell, 2012). In the present research, critical realism helps in observing and analysing a reality of processes that determine portfolio planning and development. From this standpoint, the research task is to uncover and explain the 'real' processes that shape the events portfolio design. Event portfolio itself is treated as an already existing entity of the reality; it is defined and operates within certain borders and structures of everyday life.

Pragmatism has been chosen as a research epistemology. Pragmatist knowledge is instrumental, always partial and is subject to revision and change (Jackson, 2013; Longino, 2002). Pragmatism directs this thesis to the development of valuable insights in the sphere of major events programming that inform human practices and solve concrete problems within certain contexts (Powell, 2001). The transferability of the pragmatist research findings to other settings is always context-dependant (Biesta, 2010). It requires the understanding of differences between the contexts where knowledge has been produced and where it is planned to be applied (Greenwood & Levin, 2008).

Given the lack of empirical research into the nature of portfolios of planned events, this study draws on exploratory qualitative multiple case-study. Three cities were identified based on the replication logic (Yin, 2014), where cases are selected due to the expected similarities and differences. The selection of Auckland, Wellington and Dunedin is detailed in Chapter 3 (Section 3.3).

Primary data were collected from 17 semi-structured interviews with key managers responsible for city events planning and event portfolio development in the selected cities. Secondary data in the form of city event policies and strategies, bid documents, related protocols, minutes of meetings, web-pages and mass-media publications were used to complement the interview data. Both data sets were treated as equal sources of evidence and were analysed together employing the same techniques. Thematic analysis was applied with the purpose to reveal and explain key analytical themes from multiple studies and discuss the research findings. The data were coded both manually and electronically, using NVivo 10 software.

1.6 Definitions

The literature demonstrates a relative inconsistency and variability in the use of a number of terms and concepts relevant for this thesis. Thus, it is necessary to clarify the pivotal definitions employed in the study.

Event Destination and City. In this thesis, the concept of a ‘city’ is used as an equivalent to the category of an ‘event destination’, which is understood as “a dynamic, geographically based mode of production which provides interdependent and complementary products to tourists [event visitors] and transforms the spaces and places in which this production occurs” (Pearce, 2014, p. 149). The rationale for this decision lies in the existing conceptual difference between urban management and destination management approaches. A ‘city’ in urban management may entail more generic issues that a city might face, including managing growth, planning, staffing, and organising, leading and controlling concerns (Chakrabarty, 2001; Davey, 1993). Destination management, in turn, focuses on more specific goals, such as to serve visitors’ needs; to ensure balanced and sustainable management; to enhance the long-term prosperity of local people; and to secure the long-term competitiveness (Pearce, 2015b, p. 8). This approach is more relevant to the research aim and objectives.

Event Portfolio. The concept of event portfolio is central to the present research. Several definitions are presented in Chapter 2 and Chapter 4 in order to critically analyse the term and highlight the differences in understanding of the concept by academics and event planners in the cities under study. The general notion that has been used in the thesis describes an event portfolio as a strategic grouping of different major events in a host city. The grouping serves multiple destination’s objectives; it is oriented on the delivery of a variety of positive outcomes associated with events.

Event strategy, Portfolio approach. In this research, event strategy is understood as an integrated set of guidelines, programmes and initiatives intended to achieve the stated goals and outcomes related to hosting events in cities. In some sections, the term corresponds to the published city documents that regulate the major events sphere. A related term is a ‘portfolio approach’ that explains the strategic planning and management of the portfolio of events.

Portfolio design. In this study, the definition of design is used to describe “the process of conceiving, planning and executing an idea [portfolio of events]” (Newbery, Farnham,

& Ebooks, 2013, p. 4). The portfolio design involves portfolio concept development, packaging of events, scheduling the event-related activities, overall portfolio management and development of a synergetic value of the portfolio parts.

Major events. The thesis centred on major events. Smaller local and regional events can also play a significant role in city and community development. However, in order to provide focus to the research, such events were excluded from the discussion. Various attempts have been made to define and categorise events in the literature, including by size, content, regularity and place attachment (Allen, O'Toole, Harris, & McDonnel, 2008; Bowdin, Allen, O'Toole, Harris, & McDonnel, 2011; Getz, 2012b, 2013; O'Toole, 2011). In this research, the term 'major events' refers to events that are capable of attracting a solid number of international participants and spectators, have a national profile outside of the host region and generate a significant amount of economic, social and cultural benefits (Ministry of Business Innovation and Employment of New Zealand, 2010). The discussion of major events in this thesis includes consideration of 'iconic', 'anchor' and 'premier' events. In Auckland, for example, the term 'anchor events' fully corresponds to 'hallmark events' that in literature refer to major events, significant in terms of tradition, attractiveness, quality or publicity (Getz, 2005, pp. 16-17). In Wellington and Dunedin, the synonyms of major events are iconic and premier events, respectively.

1.7 Outline of the thesis

The thesis is structured in seven chapters. The Introduction chapter presented the background and explained the rationale of the research. The research question, aim and objectives of the thesis were outlined, as well as applied research methods and key definitions.

Chapter 2 presents a comprehensive analysis of the relevant literature. The chapter reviews theoretical context and examines the critical aspects of the relationships between events and host cities. The concepts of place-making, competitive identity, eventfulness and sustainable event policy are discussed. The chapter provides substantial analysis of the event portfolio theory and its applicability in the contemporary city development agenda. It concludes by discussing the identified research gaps. The aim and objectives of the research are justified.

Chapter 3 introduces the research design, applied ontological, epistemological and methodological perspectives. A rationale for case selection is presented. The chapter outlines and discusses applied data collection methods and participant sampling techniques. This is followed by the description of data analysis, including coding process and theme development. The chapter discusses the interpretation and validity construction strategies and concludes with an overview of ethical considerations.

Chapter 4 is the first analysis chapter in this thesis. It explores commonalities and differences in the cities' institutional structure and public events sphere. The established event policy frameworks are scrutinised. The chapter aims to achieve the first objective of the research, which is to understand the influence of the local context on the realisation of the portfolio approaches in Auckland, Wellington and Dunedin.

Chapter 5 is the second analysis chapter. Its goal is to achieve the second and the third objectives of the research. It analyses the rationale and key aspects of event portfolio design in the selected cities. The sections in this chapter sequentially examine the underlying principles of utilisation of portfolio strategies in the cities under study, portfolio composing strategies and critical design factors. The chapter concludes with the analysis of the overall portfolio integrity.

Chapter 6 discusses the results of the analysis presented in Chapters 4 and 5. It introduces and explains a theoretical model of event portfolio design and achieves the fourth objective, which is to discuss the processes that shape and guide the creation of event portfolio. The chapter outlines and explains four key design processes: Imagineering, Approaching, Composing and Synergising. Each of the identified processes is critically discussed in the view of the existing literature and studied cases. The chapter concludes with the discussion of the model applicability in different local contexts.

Chapter 7 summarises the findings of the study and outlines its theoretical and practical contributions. The chapter revisits the research question, stated aim and objectives of the thesis. It concludes with the discussion of limitations of the thesis and outlines the future research agenda.

Chapter 2: Literature review

2.1 Introduction

Based on the foundations of the research discussed in Chapter 1, this chapter presents a comprehensive review of the literature related to event portfolio. The review examines theoretical underpinnings with regard to event portfolio design in cities. It sets a background for the development of an integrated research approach to explore portfolios of major events in the selected cities in New Zealand.

Firstly, the chapter explores the relationships between events and host cities. The aspects of place-making, competitive identity and eventfulness are examined. Next, the review concentrates on the rationale and strategies of government intervention in public events. Current discourse on the development of a sustainable event policy is presented. The chapter examines inter-organisational relationships and stakeholder management in the events sphere and their critical role in event policy making and strategy implementation. It continues with the analysis of theoretical foundations of event portfolio approach, including the discussion of the portfolio concept and its applicability in events planning. The chapter then concentrates on the leveraging potential of event portfolios. It also reviews event portfolio planning and development issues and discusses the existing portfolio design frameworks. The chapter outlines the existing gaps in the literature and justifies the objectives of this thesis.

2.2 Cities and events

This section initiates the discussion of the strategic use of events in cities. It outlines the roles of events in place-making activities and explains how events can attract attention to host cities and contribute to the development of their competitive identity. The concept of eventfulness is explained as a holistic approach to events programming.

2.2.1 Place-making and events

Origins of events as ritualistic practice and markers of community's life date back to the archaic times of human history. Social and cultural anthropologists have a bulk of records of different events, which have been following the existence and development of a human society, such as 'celebrations', 'rituals', 'ceremonies', 'processions' and 'parades' (Foley et al., 2012a). As Pernecky and Lück (2013, p. 1) note: "They [events] mark important

milestones and achievements, they are deployed to celebrate and engage communities, and they are an inherent aspect of many public occasions”. Richards (2015b) argues that events represent spaces of social interaction. Such spaces consolidate people by creating a sense of ‘togetherness’, belonging to a particular subculture or community (Silvanto & Hellman, 2005). Moreover, as spaces of interaction, events influence the formation of a unique place identity, providing points of identification and attachment to a particular location, for example, a host city (Derrett, 2003; McClinchey, 2015). From this perspective, events have been actively engaged in place-making. Place-making is a concept that

aims to turn public spaces into places; places which engage with those who inhabit them, places through which people do not merely pass, but have reason to ‘stop and become involved’; places which offer rich experience and a ‘sense of belonging’; places in short, which have meaning, which evoke pleasure or contemplation or reflection and, most importantly, an appreciation of cultural and environmental diversity (Ryan, 1995, p. 7).

Although this concept emerged initially in urban design, it has been actively implemented recently in events studies. Indeed, events play an integral role in creating visibility and attracting attention to cities by transforming their fabric into a performance place (Bevolo, 2014). In other words, cities have become not just stages for events, but places that are also produced through events (Richards & Rotariu, 2015). Smith (2016) proposes a term ‘eventalisation’ that refers to “the process through which urban space is produced via the staging of events” (p.37). From this perspective, events are able to animate venues and open grounds, bring new people and change the identity of city spaces. In the contemporary world of an ‘experience economy’ (Pine & Gilmore, 1999) cities try to sustain these temporary space changes and create permanent areas of festivity, leisure and entertainment. Cities aspire to include events into their fibre, marking places, adding life to city streets and redeveloping depressed city zones. Dansero & Puttilli (2010) argue that major events can be seen as an excellent opportunity to create new territories in the city and brand them, using the identity from a successful event.

Place-making requires the rise of attention from the outside of a destination (Richards, 2013). Richards (2013) discusses the significance of attention for place-making through events. Attention is treated as a type of the destination capital that should be developed. Maintaining lasting attention to a city is a very time- and resource-consuming task as it demands the existence of points of difference and contrast, otherwise the level of public,

media and visitor attention to a particular place drops and eventually leads to the stagnation and loss of attractiveness. Major events can play an excellent role as attractors, providing a short-term splash of interest to a host place. As Richards (2015a) concludes, the task is to plan events in a way that they can continuously generate attention to the destination.

2.2.2 Events and competitive identity

Place-making is intimately linked to the competitive identity (Anholt, 2007, 2010). This concept was proposed as an alternative to a mainstream understanding of place branding, where cities and nations are seen as an equivalent to corporate products and services. A common practice of destination brand promoters is to adopt tactics developed for physical goods. However, such models are unlikely to suit city brands. City brands represent a complexity of tangible and intangible assets that have been developed through the networks of different stakeholders with their own interests and priorities. While branding is a process that mainly occurs in the mind of a receiver or consumer, identity is usually defined by the sender itself (Moilanen & Rainisto, 2009).

Anholt (2007) argues that in order to create a desirable and distinctive place identity, cities need to capitalise on the interplay of factors, including destination policy, destination tourism, destination brands, investment, culture and people. Such complex activities require coordination of a large number of stakeholders, strategies and functions. The realisation of the competitive identity in a city can be achieved by: 1) the things that are done in the city; 2) the things that are made in the city; 3) the way other people talk about the city and; 4) the way the city talks about itself (Anholt, 2007, p. 30). Events play a significant role within this strategic framework. For example, the global awareness of such mega-events as the Olympic Games or the FIFA World Cup and their close associations with the host cities significantly contribute to the reputation and image of those destinations. Major events possess all three properties of a ‘competitive identity magnet’: they attract (visitors, tourists, consumers); they transfer ‘magnetism’ to other objects (for example, Sydney and Barcelona capitalise on their Olympic history and construct an image of modern and open cities); they are able to integrate normally disparate or competitive stakeholders around shared purposes and goals (Anholt, 2007).

2.2.3 Eventfulness

Seeing major events as a means to develop and enhance local image and identity, cities have been increasingly creating and staging different events in order to secure and

maximise positive outcomes. In many cases, as several commentators argue, cities have adopted a ‘stage it and they will come’ maxim (Richards, 2015a) when a lot of local resources and funds have been invested in event facilities, event bidding and event promotion campaigns - all to attract attention and increase the level of domestic and international visitation. The negative side of this process is a ‘copycat’ syndrome. In an attempt to compete with other destinations, cities copy events, bid for or borrow ‘already-branded’ large-scale events without any strategic understanding of their feasibility and long-term value (Richards, Marques, & Mein, 2014a; Richards & Wilson, 2004).

Critics argue that such ‘copied’ or borrowed events instigate huge costs for the host city; and sometimes the legacy and value they come with are questionable (Getz, 2013; Hall, 2012). In contrast, locally grown events are organised on the existing facilities; they do not require massive investment (Smith, 2012). Owned by a city, events with a long-term institutional status can deliver a wide range of positive outcomes. Literature suggests at least two types of such major events: hallmark and iconic events. The core idea of a hallmark event is its comprehensive link between an event, the city image and the community. The most well-known examples of such events with ‘high-quality and ‘big reputation’ intangible qualities (Andersson, Getz, & Mykletun, 2013) include Carnival in Rio and the Wimbledon Tennis Tournament. Iconic events are events “with high symbolic value to those affiliated with the special interest, providing opportunities for *communitas* (participating with others who hold similar values) and self-expression (defining who they are)” (Getz, 2013, p. 175). Iconic events attract niche markets, offering unique opportunities and attractions to people with particular interests, whether it is sport, culture festivities or arts.

Overall, planning of public events should be deeply embedded in the cultural, social and economic local context. Without such an anchor, the quality and sustainability that events offer might be questioned, as “any success in attracting international visits would result in other places copying the success formula” (Govers & Go, 2009, p. 53). This leads cities to strategic event programming.

The question that arises is how exactly to plan and manage a programme of events in order to ‘make a place’ and develop competitive identity? The concept of ‘eventfulness’ emerged to accumulate strategic considerations in regard with a consistent way of the utilisation of events within urban areas (Richards & Palmer, 2010). In order to position a city beyond conventional place branding, events should be used with a proactive view on

their long-term contribution (Bevolo, 2014). An eventful city is a city that uses its events to support long-term development plans and to enhance the quality of life (Richards & Palmer, 2010). In an eventful city, major events are treated as a strategic tool to achieve points of difference and reputational assets. Eventfulness could become a part of a city's strategic planning, being integrated with associated 'place-making' dimensions, such as tourism, economic development and place marketing. An advantage of events is that they are able to promote a host destination directly to the market and, from this perspective, can be seen as a competitive feature of the host place.

In this instance, a well-directed public policy with regard to public events plays a constitutive role. In the formulation of any strategy, choices have to be made about the right configuration and modules that will lead to the achievement of the most efficient outcomes, taking into account available resources and market positions (Weiss, 2007). Richards and Palmer (2010) argue that, from a perspective of an eventful city, strategic decisions should be made about city vision, stakeholder relationships, event programming and marketing, monitoring outcomes and sustainability. The following section discusses public policy domain and factors that determine intervention of city authorities into the event sphere.

2.3 Event policy perspectives

This section explores the complex area of public policy regarding planning and development of events in cities. The section outlines current event policy issues. It reviews government interventions strategies in events and explores current discourse about new event policy paradigm.

2.3.1 Events within public policy discourse

Many cities start to view development and hosting of major events as a legitimate, strategic policy field (Getz, 2012). A clear and coherent event policy programme and long-term plans to facilitate the utilisation of events as vehicles for economic and social development have been recognised as primary goals for the destinations that tend to deploy events for their strategic needs. Successful events programming requires understanding of the inherent policy-making processes in a host city and the conditions that assist with decision-making.

The analysis of the literature suggests that links between public policy and city events are not well explored. Hall & Rusher (2004) indicate that "there still remains relatively little

analysis on the political context of events and the means by which events come to be developed and hosted within communities” (p. 229). The study of regional event policies conducted by Whitford (2004) in South East Queensland’s Sunshine Coast, Australia can be named as one of a few researches to address public event policy. This research demonstrates that event themes have been included in a small number of non-specific event public policies developed in an ad-hoc manner without recognition of the contribution of events in regional growth and development. Pugh & Wood (2004) argue that although local authorities acknowledge the spectrum of benefits arising from strategic programming of events, they do not incorporate this vision into a formal plan with clear goals, methods and evaluation matrixes.

Getz (2009, 2012b) states that government policies, in general, and those related to event planning, in particular, significantly depend upon existing ideological bases, which can be rooted in philosophies, sets of values or even religious beliefs. Ideologies can be characterised by their attitudes towards such issues as social change, economic growth, social inequality, market system and the role of the state (Veal, 2010). Foley et al (2012a) critically examine different event policy formations, specifically the emergence of neoliberalism in urban governance in most developed countries. These authors argue that neoliberalism as an urban ideology “hinges on the active mobilisation of state power in the promotion of market-based regulatory arrangements” (Foley et al., 2012a, p. 66). Cities are encouraged to be self-reliant and act in partnership with the market to generate economic returns and distribute resources as required or necessary.

Cities increasingly have begun establishing new event development agencies responsible for planning and realisation of city event projects (Getz, 2012). Such organisations have been delegated authority to make decisions with regard to major event calendars and event funding. The reverse side of this relative ‘independence’ from governments is the emergence of secrecy and lack of accountability of such agencies (Getz, 2009). Foley et al. (2012a) summarise that events are now “so closely aligned with neoliberal market logic that there appears to be only limited space for alternative discourses to find a place” (p. 165).

Some critics of neoliberal government models in general (Brenner & Theodore, 2005), and in the event sphere in particular (Schimmel, 2006), document the regression in social outcomes and unsustainability of event policies because of a commitment to this urban strategy. Andranovich, Burbank & Heying (2001) discuss potential negative results for

cities from the bidding on and hosting sporting large-scale events. Such risks as a boycott or scandal cannot be predicted. The possibility always exists that an event may not be unique enough to maintain political support, push forward the development programmes and enhance the international profile of a city. The study raises concerns about the citizens' involvement during the bidding and organisation of an event. As the authors found in the case of three Olympic host cities in the USA, the participation of residents in the decision-making was minimal. To resolve this inequality in accessing to the decision-making process and prospective benefits, Getz (2009) introduces the principle of social equity, which requires full integration of residents and other groups of stakeholders in the organisational process.

2.3.2 Government approaches to intervene in events

Governments can act differently, use different event strategies and formulate specific policies. Smith (2012) distinguishes three main policy principles with regard to events, namely policy related to events, events as public policy and policy which is formulated to complement events. Traditionally, governments have acted as regulative bodies to guarantee the safety and relevance of hosted events and to ensure that events promote the values of a current regime. The alternative role of city authorities is to instigate, fund, promote and manage events. In other words, to use events as a policy instrument. The third approach is focused on the public policy formed around events with the goal to leverage potential positive outcomes. As Smith (2012) argues, cities should consider the ways in which to coordinate events in conjunction with their current wider policy goals. Major events often intersect several political fields and involve more than one level of government, thus the development of liaison and interconnectedness between different political actors and agencies on event issues is necessary (Getz, 2012). Manchester, UK, provides a good example of integrating events with other marketing-oriented policies, such as tourism, brand promotion, economic development. Public funds were invested not only in concrete events, but also in the structures required to plan, attract and run events. The event policy in Manchester was developed to support an array of other civic objectives, not indispensably connected with the event itself (Richards & Palmer, 2010).

However, the majority of current research shows that when city authorities are involved with events, it often happens on an ad-hoc basis (Whitford, 2004) or, as Getz (2009) adds, as an answer to the pressure from different interest groups, in particular, tourism. The analysis of the public agencies' intervention in event tourism in Australia, for example, indicates that the dominant priorities were economic and tourism-oriented with minor

focus on promoting indigenous culture and entertainment for the local population (Stokes & Jago, 2007). The key argument for justification of the government investment in events is the assumption that events deliver a set of significant benefits to the host community, including new jobs, opportunities for local businesses and city brand awareness (Getz, 2009). Increase in visitor numbers and their spending are presented as a ‘good news’ story (Foley et al., 2012a). As Stokes (2008) summarises, commercial realities always prevail in the public event discourse. Such an approach can lead to a situation where perceptions and well-being of local residents are neglected in favour of corporate interests. For example, mega-events like the Olympic Games require large-scale public expenditure, new infrastructure and new urban redevelopment strategies. That may deliver short-term positive results for corporate interests and undesirable or negative outcomes for the community (Hall, 2006).

2.3.3 Developing a sustainable public policy in events

Current research suggests the necessity of institutionalisation of a new framework to understand and measure the processes in the event policy. Getz (2009) argues that the effect that can be achieved by the implementation of a sustainable and responsible event policy paradigm is referred to as the equity of values between economic at one end, and social and environmental measures at the other end. The emerging discourse on sustainable event policy calls for a holistic approach where events need to be analysed in a wider context. In events, sustainability crosses different dimensions (e.g., economic, political, and environmental) and pertains to the complex relationships among people, societies and the natural environment (Pernecky, 2013). As Pernecky (2013, p. 26) states, “events must be recognised as a medium through which societal relations and experiences are maintained, developed and transformed”.

Traditionally, the analysis of principles of sustainability in events has been based on the ‘triple bottom line’ (TBL) approach which originally comes from corporate management and describes the organisation’s capacity to create value, issues and processes in all economic, social and environmental domains to minimise any harm from its activities (Elkington, 1998). Fredline, Raybould, Jago & Deery (2005) argue that the rationale behind the TBL model in the context of events is “to illuminate the externalities associated with business activities and therefore to promote sustainability through planning and management practices which ameliorate negative outcomes and promote positive ones” (p. 3). Richard & Palmer (2010) have extended the TBL model to cover additional dimensions in event analysis and evaluation and have proposed a so-called

quintuple bottom line (QBL). Apart from traditional TBL areas such as economic (visitor numbers, job creation and income), social (community cohesion and increased participation) and environment (reduction of waste and noise pollution), the authors suggest to add parameters of corporate governance, which evaluates the representation of stakeholders in decision-making bodies and event capacity building aspect, which refers not only to the development of event facilities and organisational capacity but also to the 'learning capacity' of the city that will lead to effective growth and development of its eventfulness.

Whitford (2009) suggests a planning framework to provide local governments with a constructive ground for the development of a coordinated event policy. The framework is comprised of three interrelated sections: 1) the event policy pathway, 2) the event policy community and 3) event development paradigms. The event policy pathway deals with the entrepreneurial approach to the development of event policy, when local governments incline to see the event industry as a primary catalyst of wealth creation, and take risks in exploiting new market opportunities in cooperation with the private sector. Regional and local event plans are needed to be established, taking into consideration such issues as focus of events, style of events, types or categories of events, and drivers and inhibitors of events. An event policy community includes a variety of representatives, for example, different interest groups, event units, partnerships, government agencies, and community individuals. The event development paradigms identify the need for a development theory, which coordinates event tourism policy with regional development. Theoretically informed event policy has a capacity to facilitate destination development, attract new investments, tourists and satisfy local residents.

To avoid an ad-hoc city events programming, when events are organised without any strategic vision of their objectives and roles and to meet the requirements of a sustainable event policy, Getz (2013) points out a necessity of developing an *event portfolio*, which would contain a strategic mix of events that target different audiences, meet various objectives of a host city and deliver positive outcomes. Event portfolio can be considered as "a strategic opportunity capable of promoting joint tactical planning and enhancing mutual relationships in order to accomplish multiple policy purposes" (Ziakas, 2014b, p. 338). A portfolio of events is capable of satisfying all the 'pillars of sustainability' (Raj & Musgrave, 2009, p. 5) and contribute to community and tourism development (Gibson, Kaplanidou, & Kang, 2012). Planning and realisation of a portfolio approach requires cooperation and collaboration of different actors, which influence the strategy-making

and aim to satisfy their usually variant goals. The next section focuses on the inter-organisational relationships and stakeholder management in the events sector.

2.4 Inter-organisational relationships in events sector

Implementation of an effective event policy and strategy requires collaboration, coordination and partnership among different stakeholders, including organising and supporting boards, public sector bodies, community groups and volunteers (Ziakas, 2014a; Ziakas & Costa, 2011a). Hence, the understanding and management of an array of stakeholders' interests and motives has been seen as a critical aspect of an event portfolio approach development (Getz, 2013; Ziakas, 2014a).

Any event has the capacity to bring different actors together and foster community networks through participation, involvement in planning of event-related operations and the decision-making process (Misener & Mason, 2006; Ziakas & Costa, 2011a). Larson (2009b) envisages events as “creating an imaginary space where different actors project their imagination on how the event can fulfil their interests” (p. 393). Literature on events acknowledges the importance of building relationships among different interest groups during the organisational phase of every event project. Misener and Mason (2006) highlight the significance of an analysis of the nature of event-related organisational networks and relationships in different political and cultural contexts. Mapping and analysing stakeholder networks identifies the key players, their expectations and intentions. Understanding the connections in a stakeholder web may result in the development of sustainable strategies that not only meet the needs of different power groups but also utilise the full potential of these groups in event planning. At least two theoretical approaches can be used to analyse and evaluate event stakeholder relationships, namely, stakeholder theory and network theory.

2.4.1 Event stakeholders

Freeman (2010) defines stakeholders as “any group or individual who can affect or is affected by the achievement of the organisation's objectives” (p. 46). Freeman's model of stakeholder management includes such stages as evaluation of stakeholders, management of stakeholders in order to accomplish organisational objectives, and measurement of stakeholder satisfaction with the organisational outcomes (Freeman, Harrison, Wicks, Parmar, & De Colle, 2010). The influence of stakeholder theory on event management is well-documented and widely discussed (e.g., Andersson & Getz,

2008; Buch, Milne, & Dickson, 2011; Getz, Andersson, & Larson, 2007; Merrilees, Getz, & O'Brien, 2005; Sciarelli & Tani, 2013). Different event stakeholders have different levels of power and influence and can be mapped, managed and evaluated according to a diversity of parameters. For example, Getz et al. (2007) emphasise such major stakeholder roles as: 'facilitator', individuals and organisations that provide an event with essential resources; 'regulator' whose approval and cooperation are required (usually government agencies); allies and collaborators, who provide intangible help and can act as marketing partners (professional associations and tourism agencies); 'co-producers' – independent organisations that participate in the organisational process; the audience and the impacted, the groups and individuals affected by an event.

O'Toole (2011) applied an alternative, project management approach and distinguished primary, secondary, internal and external event stakeholders. Primary stakeholders – attendees and sponsors – are very focused and interested in the success or otherwise of the event. Secondary stakeholders, for example, local police, are interested only if an event passes a threshold of importance. Internal stakeholders are directly involved in event planning and realisation of an event project. This is an organising committee. External stakeholders have strong interest in an event, but are not directly involved in its planning and production. This group includes local residents, local business and suppliers.

In an event portfolio context, the analysis of stakeholder groups can also lead to the determination of the significance of particular stakeholders. This, in turn, can stimulate the establishment of new directions and development of specific stakeholder strategies. Mitchell, Agle, and Wood (1997) suggest a concept of salience in corporate stakeholder analysis. Salience is a tri-dimensional construct, which includes such attributes of a stakeholder as their power to influence the organisation, legitimacy of relationship with the organisation and urgency of the stakeholder's claim on the organisation. Managers should take into account only those stakeholders that possess all three influential attributes.

Apart from identification of the key stakeholders who can influence the development of events and the whole portfolio of events in a destination, it is critically important to understand the motives of stakeholders and how those motives affect the inter-organisational relationships (Ziakas, 2014a). Hede (2008) proposes a framework where the TBL concept is incorporated into the stakeholder theory for the purpose of identifying key stakeholders' interests towards a particular event. The research shows that among fourteen identified event stakeholder groups only three (government, residents and

community groups) appear to have interests in all three domains of the TBL, namely economic, social and environment spheres. The TBL stakeholder framework proposed by Hede (2008) provides a basis for specifying and ranking the objectives of an event with regard to the main stakeholders' interests and priorities. This framework can be utilised by event and destination managers to develop strategies that simultaneously meet the needs of a number of stakeholders, rather than implement different strategies for each stakeholder.

Overall, stakeholder theory emphasises the relationships between an event/portfolio of events and its stakeholders, placing a particular event project in the centre of the investigation. However, the organisation of an event also depends on how different groups of stakeholders communicate and interact with each other within the actors' network. Network theory adds a new dimension to the stakeholder theory, taking into consideration complex and dynamic processes between participants of the network, which may change the structure or innovate an event network (Richards & Palmer, 2010).

2.4.2 Inter-organisational networks in events

Inter-organisational networks can operate as institutionalised units with formal structure and hierarchy, or as non-institutionalised units with invisible structure and non-specific objectives (Ziakas & Costa, 2010b). Goal-directedness in a network is characterised by the establishment of an administrative entity that plans and coordinates activities of the network. Processes in such networks are constructed around specific shared goals (Kilduff & Tsai, 2003). When individual actors are not guided by any central network agent and actors form ties and partnerships based on their own interests, then this particular network operates using serendipitous trajectories (Kilduff & Tsai, 2003).

An event network covers a variety of organisations from different business and administrative sectors which are engaged in relationships with the purpose to achieve their desirable goals. As Ziakas and Costa (2011a) argue, events networks are usually formed randomly and typically have informal nature. Stokes (2007) has identified three main factors that influence the atmosphere of inter-organisational relationships within event tourism networks; namely, the impact of power and political issues; the importance of trust; and the importance of a shared commitment. Other aspects which also affect the network actors' relationships include the degree of relationship and network formality, network permanency and clustering, the fluidity of membership, and the actor's position in the network hierarchy. A lack of integrated network strategy often leads to isolation of

some organisations and to the limitation or absence of cooperation ties between them (Weed, 2003).

An event portfolio could provide a common ground to unite different stakeholders and enable the usage of an integrated set of event-related resources for a long-term perspective (Ziakas & Costa, 2011a). Such an inter-organisational collaboration within a portfolio's network might take forms of information exchange, resource sharing and joint problem-solving (Ziakas & Costa, 2010b). However, the inter-relationships among different actors within an event network can also be characterised by power games, coalition building and change dynamic (Andersson & Getz, 2008; Larson, 2002, 2009b).

The formation of an event portfolio strategy in a city leads to the introduction of the notion of a 'political market square', where various stakeholders operate with a varying degree of power and influence, negotiate, form alliances and affect the decision-making process in the event industry (Getz, 2012a; Larson, 2009a). According to Ziakas (2014b, p. 338) "event policy network should view and treat an event portfolio as a strategic opportunity, capable of promoting joint tactical planning and enhancing mutual relationships in order to accomplish multiple policy purposes". One of the critical aspects that influence the realisation of the event portfolio approach is the conditions of an institutional structure that established the organisational environment, where events are planned, delivered and leveraged (Ziakas, 2014a). This structure entails local governance and administrative systems which facilitate the incorporation of events into policy agendas and foster collaboration between event stakeholders and policy-making agents.

Stokes (2008) suggests three frameworks for strategy making in event tourism that entail different organisational structures, processes and decision criteria. In the corporate, market-led framework, decisions are usually taken by one or two agencies with a strong leadership role. A powerful but small group of stakeholders determine and implement a corporate-driven agenda. Decisions are driven by economic indicators, attractiveness and growth. Event strategy-making focuses on major event bidding and local events that generate significant visitation. In the community, destination-led framework, strategy is initiated by public sector agencies and community groups in order to engage a wider local population in decision-making with regard to event planning. Community round-tables and workshops are organised and decisions are based on a wide spectre of impacts, including social, ecological, cultural and economic outcomes. Priority is given to fostering new and supporting existing local events and festivals. A synergetic framework is situated in between these two extremities. It integrates strategies for major, new and

existing events. Public agencies assume leadership seeking a balance of stakeholder input. The decisions are both market and community driven. Although, from a practical standpoint, none of the suggested perspectives reflects all the processes and activities that drive event policy and strategy making within event planning networks, the discussed frameworks can be treated as a continuum or spectre of configurations that can be applied by cities on different stages of their event industry development and portfolio assemblage.

Resource dependency also plays an important role and can significantly affect the structure of the event network and relationships between different interest groups. Dependence occurs when one stakeholder controls the resources that are required by another party to satisfy its needs (Pfeffer & Salancik, 1978). Andersson and Getz (2008, p. 203) argue, that the initialisation of events and festivals “ensure sustained support and resources”. A portfolio approach in this instance is capable of facilitating resource distribution and satisfying both resource owners and buyers as it creates a structural network and interdependence among key actors. An institutional status of an event portfolio can be achieved by gaining and maintaining its legitimacy from the stakeholder perspective (Andersson & Getz, 2008).

Overall, event policy domain and inter-organisational relationships provide a strategic context for planning and development of event portfolios in cities. As Ziakas (2014a, p.161) concludes,

The exploration of the web of organisations that are involved in the delivery of an event portfolio and the level of coordination among them are essential for understanding the means by which event stakeholders take advantage of their role in the network to interact with each other and achieve both individual and portfolio-level goals.

The portfolio approach, which manifests itself in a holistic event programming, switches the focus from single events and their relationships with the host place to a strategic grouping of events and portfolio synergetic values.

2.5 Towards event portfolio approach

This section critically examines the current discourse with regard to the development of portfolios of events in cities. The section briefly explains the rationale behind the switching of the academic focus from the analysis and evaluation of single events toward portfolios of events and their contribution to host city development. Key benefits of event

portfolios are outlined. The section concludes with the discussion of the portfolio applicability within the dimension of destination capitals.

2.5.1 From separate events to portfolios of events

Although there has been a sharp increase in academic studies of events in recent years, the predominant tendency is that different genres and types of events have been analysed in isolation from one another. The vast majority of research is confined to the examination of single events, with the focus on their purposes, social and economic impacts, event legacy and visitor and resident perceptions (e.g., Bodet & Lacassagne, 2012; Choong-Ki, Taylor, Yong-Ki, & BongKoo, 2005; Faulkner, 2010; Gratton & Preuss, 2008; Hall, 1992; Pasanen, Taskinen, & Mikkonen, 2009; Preuss, 2007a; Weed, 2008). The problem with such a ‘fragmentary’ approach lies in the narrow understanding of events and their organisational and contextual peculiarities (Ziakas, 2014a). A temporal character of a single event does not guarantee any long-lasting positive impacts for a host destination (Jago, Chalip, Brown, Mules, & Ali, 2003; Ziakas, 2014b). Even if an event lasts for several weeks, such as the FIFA World Cup or the Olympic Games, it is difficult to sustain its benefits for a long period beyond the event itself (Chalip, 2014).

Thereby, some scholars (e.g., Andersson et al., 2013; Getz, 2012b) call for an alternative approach, aiming to investigate the full population of events in a host destination, as well as the contextual conditions that can influence the dynamic of events’ life cycle, their design, production and staging. A common population of events may include such genres as festival, ritual, game, spectacle, theatre, music, and meeting. These genres entail a range of cultural, sport, arts, and business events (Ziakas, 2014a). The shift of focus from single events to the realm of multiple events can instigate an emergence of a new research paradigm, where a series of well-planned and organised events can be envisaged as tools that are used by a destination to achieve its goals with regard to sustainable development, urban regeneration, event tourism growth and destination promotion (Getz, 2013; Ziakas, 2014a). The analysis of the whole population of already existing events can become the starting point in the development of a long-term event strategy where separate events are jointly managed within an event portfolio.

Literature suggests that the development of ‘goal-driven’ and ‘value-based’ (Getz, 2008) event portfolios constitute a beneficial approach to achieve and sustain the positive impacts of events and optimally use the available destination resources. Portfolios of events, in comparison to separate events, are able to generate sustainable event impacts

as well as increase the size of a local event market, respond to different community issues and appeal to a variety of people's interests (Ziakas & Costa, 2011c). The implementation of the event portfolio strategy could become a critical transformative step for a city on its way from "being a city with events to become an eventful city" (Richards & Palmer, 2010, p.43).

2.5.2 Defining portfolio of events

The term 'portfolio' was borrowed from the modern portfolio theory (Markowitz, 1952, 1991). Accordingly, a portfolio is a grouping of multiple financial assets or investments which are held to maximise expected return to their holder. Markowitz (1952) argues that investors should diversify their funds and select portfolios taking into account portfolios' overall risk-reward characteristics, instead of selecting assets based on their individual potentials. A good integrated investment portfolio provides an investor with the protection and opportunities with respect to a wide range of contingencies on the market (Markowitz, 1991). Applying this theory to events, an event portfolio can be treated and managed as a collection of complementary assets (events), each contributing to the desired total with the purpose to generate tourism or economic gain (Getz, 2013). Diversification of events in a portfolio can minimise risks of event failure, for example, as a result of not attracting the target audience or a poor promotion campaign. Thus, portfolios of events can be managed similarly to enterprises' product or brand portfolios. Following this line, Getz (2013) proposes several 'investment' approaches to the development and analysis of event portfolios, namely an 'aggressive event portfolio' with high reward and high risks which are correlated with the staging of one-off mega events; a 'defensive portfolio' which is based on low-risk locally owned events; and a 'balanced portfolio' with different kinds of events aimed at different target markets at different times of the year.

The abovementioned investment-oriented portfolio concept can be successfully implemented in event tourism and destination brand promotion (e.g., Chalip, 2005; Chalip & Costa, 2005; Getz, 2005, 2008, 2013). However, Ziakas and Costa (2011c) call for a new comprehensive interdisciplinary framework to study event portfolios. Such a framework takes into account, firstly, diverse contexts whereby events can be used to achieve community goals (economic, social, cultural, environmental) and secondly, a variety of opportunities with respect to utilising event portfolios to establish joint strategies, synergies, and collaboration among different event stakeholders (Ziakas, 2014a). Considering that an event portfolio has the potential to assemble different events,

event stakeholders and host community resources in a network and manage an array of community purposes through the implementation of joint strategies, Ziakas (2014a) suggests the following holistic definition:

An event portfolio is the strategic patterning of disparate but interrelated events taking place during the course of the year in a host community that as a whole is intended to achieve multiple outcomes through the implementation of joint event strategies (p. 14).

This definition highlights the strategic nature of the development of an event portfolio. An act of the strategic planning entails the grouping of events which cover an array of different themes, cater for a range of audiences and serve multiple community purposes, producing different outcomes (Getz, 2012b; Richards & Palmer, 2010; Ziakas, 2014a). Events included in a portfolio can encompass diverse genres in order to reach a wide range of target audiences. The purpose of diversification of events in a portfolio should capitalise on the capacity of each event to maximise the overall value of a particular event portfolio (Ziakas, 2014a). As a result, synergy and relatedness among events in a portfolio should be cultivated. According to Ziakas (2013, 2014a, 2014b), relatedness of events may occur through the generation of new and complementary markets, transfer of knowledge, utilisation of event theming based on conceptual continuity and common internal logic of events in a portfolio, mobilisation of sharing of resources, common elements and objectives, as well as volunteer pools that can facilitate staging of events.

Overall, different approaches to event portfolio utilisation (economic goals, socio-cultural objectives) determine the definitional variety and researchers' preferences on how to treat this entity. As a relatively new concept, event portfolio still needs a comprehensive theoretical examination of its key patterns. A range of organisational and managerial contexts, as well as different challenges faced by host cities, are likely to affect the vision on event portfolios and their specific characteristics. To conclude, a portfolio incorporates different events in a coherent way. It targets and reaches diverse market segments and serves different cities' objectives.

2.5.3 Portfolio of events and destination capitals

From the operational perspective, a key concern appears when it comes to the coordination of portfolio development, where available resources should be allocated, goals be prioritised and joint strategies be implemented to equally distribute benefits and meet the requirements and perceptions of all interested stakeholders (Ziakas, 2014a). This

calls for the development of a process-oriented portfolio approach. Such approach incorporates design, management and leveraging of an event portfolio and aims to develop balancing mechanisms among all the principles of sustainable development, including socio-cultural, economic and environmental outcomes (Ziakas, 2014a). Local context where portfolios operate should be scrutinised in order to understand the complexities of event-related processes in a city and its unique set of developmental needs which a portfolio of events might be able to satisfy. From this perspective, Sharpley's (2009) framework of destination capitals might serve as a good starting point.

Sharpley (2009) argues that every destination has a unique combination of environmental, political, social and cultural characteristics; as a result, every destination has its distinctive development needs. Therefore, local development should be based on the exploitation of this particular set of destination capitals. Destination capitals may include human, political, economic, environmental, technological and socio-cultural dimensions. Identifying its development needs and opportunities as well as external forces that might influence the process (e.g., political, economic, legal or environmental), city event planners can establish their major event portfolio strategies which would reflect these local capitals. In this instance, a portfolio of events will meet all the requirements for a sustainable development of a host destination. It would reflect the local context and the development objectives and would act as an appropriate leveraging tool. The following section will discuss the concept of leveraging in detail.

2.6 Event portfolio leveraging

In order to exploit the strategic value of an event portfolio, a set of leveraging activities should be designed and implemented by event portfolio planners (Ziakas, 2014a). Such activities could be focused on the relationships among different events and their stakeholders. They can synergise events with one another and with the host destination's overall product mix (Ziakas, 2010, 2014a; Ziakas & Costa, 2011a). This section thoroughly examines the concept of leveraging and its application within portfolios of events.

2.6.1 Introducing the concept of leveraging

The concept of leveraging shifts the research focus from merely analysis of impacts of events and their ad-hoc effects towards the development of a research framework to understand how events can be leveraged in a long term perspective and what strategies

can be implemented to achieve and increase positive outcomes from events (Chalip, 2004, 2006; O'Brien, 2007; O'Brien & Chalip, 2008). Chalip (2006) argues that, although impact studies provide useful information about event positive or negative impacts on economic and social development, tourism promotion or environmental sustainability, they do not explain why these outcomes occur. Thus, impact studies are insufficient for strategic event planning and management (Bramwell, 1997).

The term 'leveraging' is derived from business literature and refers to the long-term strategies through which corporations seek to achieve the highest return to their investments (VanWynsberghe, Derom, & Maurer, 2012). Leveraging involves identification of existing assets of a corporation and further creation and enhancement of the value of these assets to benefit the business (Boulton, Libert, & Samek, 2000). The analogy between the business leveraging approach and events can be briefly described as follows: leverage initiatives are "those activities which need to be undertaken around the event itself, and those which seek to maximise the long-term benefits from events" (Chalip, 2004, p. 228). The concept of event leveraging can be viewed, firstly, as a knowledge of the potential that events can generate for the host destination and its residents and, secondly, as an intention to realise this potential on different levels of community operations (Quinn, 2013). The new approach emphasises the necessity of pre-event planning as well as during and after event analysis and evaluation. Smith (2014, p. 21) argues that in order to achieve expected positive results from leveraging initiatives, a leveraging approach needs to be "...an integral part of decision-making process in the early stages of event planning...". In other words, it is essential for city event managers to design, implement and evaluate tactics that employ all opportunities that events offer to the community. Traditionally, events have been used in an 'ad-hoc' manner and the shift towards the leverage concept leads to a wider integration of events into the public policy domain (Richards & Palmer, 2010; Smith, 2014).

To understand the core idea of the event leverage concept it is essential to emphasise the difference between event impacts and leveraged outcomes. The impacts of events can be defined as the automatic effects of event projects (Smith, 2014). Preuss (2007a) argues that event impacts are often caused by a short-term impulse and affect the event environment (e.g., city economy, social wellbeing, local business development), directly through the event. For example, mega-events are capable of generating new jobs, business opportunities, enhancing the destination image and increasing tourist flows. Because of the substantial investment in event-related infrastructure, such effects can be materialised

only due to the results of a particular event staged in a city (Smith, 2014). Negative impacts such as increased prices for services, inappropriate development, noise, crime and a tarnished destination brand can also occur (Jago, Dwyer, Lipman, Lill, & Vorster, 2010). All these impacts differ from leveraged outcomes that have been deliberately planned and undertaken around an event to maximise the long-term benefits from staging this event. As O'Brien (2005, p. v) argues, "the event itself is not the intervention, but rather, represents a temporally limited set of opportunities...". The main task for the event planners is to identify these opportunities and utilise them in order to achieve positive results (O'Brien, 2006).

Smith (2013) distinguishes between *event-led* and *event-themed* leveraging. When event-led leverage projects are closely linked to events and try to expand positive impacts that are normally expected from staging of events, event-themed leverage activities, in their turn, can be defined as general initiatives, which are planned to capitalise on and maximise the opportunities derived from hosting an event. In the latter case, an event is used as a hook to achieve more benefits which are not related directly to its hosting. The main advantage of event-themed initiatives is that they can help to extend the reach of events and benefit "a wider group of beneficiaries in a wider set of policy fields" (Smith, 2013, p. 13). Although these suggestions have been related, in the first instance, to the staging of large-scale international sporting events, it is possible to assume that the leveraging tactics could be also implemented while planning small community events with such leverage objectives as, for example, fundraising, charity or community members support.

The current literature demonstrates the potential of small-scale events in generating an array of leveraging opportunities for the host communities (e.g., Gibson, Willming, & Holdnak, 2003; O'Brien, 2007; Ritchie, 2004; Ritchie, Mosedale, & King, 2002). For example, tourism seasonality can be overcome by running a rugby season in off-tourism periods (Higham & Hinch, 2002). Ritchie (2005) and Wilson (2006) argue that small-scale sport events are capable of generating substantial benefits for the local economy through using available infrastructure and providing secondary expenditure opportunities. Overall, leveraging implicates strategic thinking and decision-making where both outcomes and the ways to achieve them are planned in advance (Smith, 2014).

2.6.2 Event portfolio as a leveraging resource

To sustain and enhance benefits through event leveraging, the concept of a strategically developed event portfolio should be employed (Parent & Smith-Swan, 2013). Chalip (2004) has developed a general framework where event portfolio is envisaged as a leverageable resource for economic development of a host city. Chalip (2004) distinguishes immediate and long term leveraging activities of a portfolio. The former are designed to increase visitor spending, lengthen visitors' stays, retain events expenditures and enhance local and regional business relationships by building new markets and supply chains. In the long-term perspective, events are used as means to construct and enhance destination image. This process encapsulates destination show-casing via event advertising and reporting as well as using events in advertising and promotion for the host destination (Pereira, Mascarenhas, Flores, & Pires, 2015). Westerbeek and Linley (2012) argue that the development of a strong event portfolio may significantly improve long-lasting impressions about a host destination.

Although Chalip's leveraging model (2004) emphasises the important role of event portfolios in economic and business spheres, it does not cover another critical dimension of a city development, namely event tourism. To fill this gap, Ziakas (2014a) has adopted the Chalip's framework to event tourism and has suggested several additions to the general leveraging framework. If a city goal is to maximise benefits from event visitors, the following strategies should be incorporated:

- *Amplify visitation.* Events should appeal to a wide range of audiences and be responsive to tourists' needs and interests, providing unique experiences which are integrated with the destination's product mix;
- *Diversify tourism product.* The creation and inclusion of disparate events in a portfolio can enrich the local tourism product mix;
- *Schedule selected events off-season.* This means is able to help in regulating the seasonal character of the tourism product and redirecting tourism flows;
- *Rejuvenate destination.* The premise of this strategy is that the creation or attraction of events can improve the image of a destination and attract the interest of tourists;
- *Consolidate destination assets.* In coordinating event implementations, the destination's strengths and attributes should be consolidated in a joint scheme in order to create the value of the tourism proposal to the target audience;

- *Bolster destination's authenticity*. The key idea of this strategy is to create event experiences that are valued by or perceived as unique and authentic for tourists (Ziakas, 2014a).

Along with economic and tourist leveraging perspectives, portfolios of events can also be used as a means to foster the community social development and engagement. The idea of an event's social value is generally grounded in the anthropological theory of 'liminality' and 'communitas' (Turner, 1969, 1974). The theory explains the collective sense of the sacred and ritualistic uncertainty which participants experience in the 'space-time' environment of an event. The presence of the sacred aspect defines the event as liminal, when normal social boundaries are intermitted and new social constructions are explored (Ziakas & Costa, 2011b). The sense of community that appears due to such collective experience is called "communitas" (Turner, 1974).

Chalip (2006) proposes two key objectives to generate and cultivate liminality while staging events, namely, fostering social interaction and prompting a feeling of celebration. A framework for event social leverage (O'Brien & Chalip, 2008) has been suggested based on the assumption that liminality, which is created during an event, in turn, generates opportunities for social leverage. The first opportunity is the communitas engendered by the events and the second is the attention of media and sponsors.

Social leverage may result in generating a range of positive social effects, for example, uniting people, increasing civic pride, promoting wellbeing, encouraging volunteering and strengthening community networks. The implementation of complementary event activities which increase personal identification and social interaction can increase the value of the main event (García, 2001). An introduction of cultural or arts programming elements to a sport event, for example, can broaden the range of entertainments provided to attendees and strengthen the event's appeal to those market segments that otherwise might not be reached.

Ziakas and Costa (2011b) add the concept of 'event dramaturgy' to events' social leverage discourse. Event dramaturgy can be described as a process of an event's meanings construction, where members of the community are able to revitalise the sense of community connection and identification (Ziakas & Costa, 2010a). From the position of community development, event dramaturgy is understood as an array of symbolic projections, which reflect the values of local people and address community issues.

Understanding of events as symbolic social spaces that reflect the local community's history, culture and heritage and the following design of event meanings can help in cultivation of liminality within an event and in further integration of events into the community development agenda (Ziakas & Costa, 2010a, 2011b).

2.6.3 Issues with event portfolio leveraging

A set of problems related to event and portfolio leveraging can be identified in the current literature. For example, Smith (2014) enquires about who should be responsible for the development and implementation of leveraging strategies? Event leveraging initiatives are usually separate from the delivery and management of event projects, thus it is difficult to relocate responsibilities for their planning. Ziakas (2010, 2014a) argues that success of leveraging depends on inter-relationships between community stakeholders and event planners. Community organisations that have expertise and experience in relevant policy fields are capable of delivering leveraging projects in their particular fields. For example, the Greenest City initiative was developed by the City of Vancouver in conjunction with the 2010 Winter Olympic Games (VanWynsberghe et al., 2012). However, the realisation of leveraging projects relies on events, so the involvement of event organisers is crucial. This process has its advantages and disadvantages. On the one hand, event organisational committees are often temporary organisations, focused on specific management questions. They are not suited for long-term leveraging initiatives. On the other hand, the removal of leveraging from the management of an event may lead to difficulties in delivering leveraging in an optimal manner (Smith, 2014).

Another significant challenge of leveraging is funding. Delivering effective initiatives demands access to solid funding and investment. In most mega-events projects, the majority of available funds is spent on building infrastructure and staging. Thus, the resources allocated to specific leveraging initiatives are limited and are vulnerable to criticism that they exist only to justify the bid (Smith, 2014).

Potential problems associated with leveraging initiatives can also emerge during the evaluation phase of the implemented strategy. Researchers find it hard to separate the impacts of the event from the effects of supplementary initiatives (Smith, 2014). Moreover, there has not been much research undertaken on the effectiveness and efficiency of leveraging initiatives.

In view of these challenges, an event portfolio can be seen as a strategic opportunity to establish leveraging as a central organising principle and integral part of decision-making. Events should be chosen and delivered on the basis of their potential to provide and leverage desirable outcomes. In the case of a well-planned event strategy, special funds may be reserved for approved leveraging projects. In addition, an appointment of a coordinating entity can facilitate the process of assembling events and establish connection among different stakeholders in order to coordinate leveraging, financing and evaluation of results (Ziakas, 2014a).

2.6.4 Cross-leveraging opportunities within an event portfolio

The value of an event portfolio comes from both the interconnectedness and inter-relationships of events, and their separate contribution to the overall capacity to build a strong image of an event destination (Chalip, 2005; Ziakas, 2013; Ziakas & Costa, 2011a). This calls for the examining of events in relation to one another in a portfolio in order to identify the key means that provide the synergy among them. Chalip and Costa (2005), for example, argue that it is pivotal to determine what roles sport events can play in relation to one another and to cultural events. This logic can be applied to all events in a local portfolio (Ziakas, 2014a). Ziakas (2014b) distinguishes three basic types of event portfolio cross-leveraging:

- a) cross-leveraging the different recurring events of the portfolio,
- b) cross-leveraging the whole portfolio with one-off mega- or large-scale events, and
- c) cross-leveraging the portfolio of recurring events and/or one-off events with the host community's product and service mix (p. 330-331).

The goal of cross-leveraging is to enable the development of synergy among events in the portfolio to achieve and sustain the benefits and planned legacies of hosted events (Ziakas, 2014b). The issue that arises here is how to create the positive associations among events to activate the abovementioned synergy in events inter-relationships. Ziakas and Costa (2011a, p. 411) suggest a conceptual continuity among events in the portfolio as a ground basis for establishing these positive associations: "The event's conceptual continuity lies in a shared internal logic that entails the use of symbols, themes, narratives and offers event elements." The authors argue that the continuity between different events may facilitate the development of synergies and strengthen the substantiality of communication messages to the target market.

The choice of an appropriate cross-leveraging tactic depends on the community resources, institutional structure of the host community political and business environment and stakeholder interests and intentions. However, to date, there is an essential lack of emphasis in empirical studies related to leveraging or cross-leveraging potential of host cities' event portfolios. One of the issues arises in relation to the inclusion of one-off large-scale events into the city events programme or portfolio. The next section outlines the discussion of this topic in the literature.

2.6.5 Event portfolio and one-off large-scale events

To build and expand the knowledge related to leveraging and cross-leveraging of event portfolios for multiple community purposes, it is critically important to take into consideration the arising research discourse on the ongoing legacy of mega-events and tactics of inclusion of such events into the local portfolio of events (Ziakas, 2014a). On one hand, event portfolios can hardly be compatible with such events because of their specific requirements, massive investment and preparation (Ziakas, 2014a). As Getz (2013, p. 157) argues, adding a mega-event to a city's portfolio will instantly overload the system and divert attention and resources. On the other hand, the development of an event portfolio can build capacity (infrastructure, know-how, and social capital) for hosting mega-events. Therefore, hosting such kinds of events would allow the community to capitalise on event portfolio and the positive impacts it generates (Ziakas, 2014a). Moreover, large-scale one-off events can fulfil different roles, for example, they can contribute substantially to growth and innovation, environmental sustainability and other public policy objectives (Clark, 2008).

The relationships between one-off events and event portfolios is still an undisclosed area in event studies. For event organisers, an event portfolio could represent a strategic community asset to draw resources and capitalise on the whole capacity of a host destination to stage events (Ziakas, 2014a). For a host community, staging of a well-planned mega-event can also bring significant benefits and opportunities, particularly in a situation wherein a city has already achieved its event-related 'critical mass' (Getz, 2013). Some current research suggest that one-time events can play a strategic and sustainable role in event portfolios, however an integration of the overall destination experience with such events is required (e.g., Taks, Chalip, Green, Kesenne, & Martyn, 2009). It is evident that appropriate strategies should be identified and employed with regard to incorporation of one-off events into a destination's portfolio (Ziakas, 2014a).

In the academic discourse, the benefits and impacts associated with hosting mega-events are reflected to the concept of proactively planned sustainable long-term legacies (Leopkey & Parent, 2012). Legacy with regard to sporting large scale events can be defined as “all planned and unplanned, positive and negative, tangible and intangible structures created for and by a sport event that remain longer than the event itself” (Preuss, 2007a, p. 211). Positive legacies can include new infrastructure, urban revival, increased tourism and business opportunities, sport infrastructure (e.g., Cornelissen, Bob, & Swart, 2011; Gratton & Preuss, 2008; Kaplanidou & Karadakis, 2010; Parent & Smith-Swan, 2013). Potentially negative legacy of mega events for a host destination can be increased prices for services and housing, high construction costs, tarnished brand and reduced destination pride due to problems at the event, excessive energy and water usage, ‘white elephants’ (i.e. unused facilities), evictions (e.g., Jago et al., 2010; Parent & Smith-Swan, 2013; Preuss, 2007b).

As a multi-dimensional phenomenon, legacy plays an important role in all phases related to the event management: bidding, preparing for the event, staging the event and having a plan for the post-event phase (Hiller, 1998, 2006). Even the bidding process itself, without securing the right to host an event, can bring many positive benefits for a city (Clark, 2008).

The resulting legacy of mega-events represents a valuable leverageable resource (Boukas, Ziakas, & Boustras, 2013; Ziakas & Boukas, 2012). Based on Chalip’s (2004) general event leveraging model, and Weed’s (2008) Olympic tourism leveraging model, Boukas et al. (2013) have developed a framework for leveraging post-Games Olympic tourism. According to this framework, there are two opportunities for leverage, namely, the legacy of the Games and its effects on the cultural heritage of the host city. This requires the implementation of synergetic cross-leveraging strategies with the goal to optimise sport-related and cultural-related benefits. The authors suggest two key tactics to attain these strategic objectives. The first tactic is to utilise the Olympic venues for organising events and other activities; the second tactic uses the Olympic legacy and heritage themes in media to reinforce the host city’s image. The researchers also propose four derivative means to leverage post-games Olympic tourism: the design of Olympic-related attractions, the packaging of sport and cultural attractions, the attraction of conferences and exhibitions, and the development of an event portfolio.

The significance of the suggested framework lies in the fact that it shifts the attention from leveraging a mega-event itself and extends the objectives of leverage beyond sport to cultural heritage tourism (Ziakas, 2014a). Thus, an interdisciplinary approach can be employed to facilitate the development and implementation of cross-leveraging initiatives. Ziakas (2014a) concludes that, in this context, events from a local portfolio need to be cross-leveraged with a mega-event's legacy, engendering a range of positive outcomes in the post-event period.

Although the abovementioned framework paves the way to a more sustainable and integrated decision-making with regard to the development of appropriate events strategies, and legacy management, it covers only tourism, and to some extent (post-event venues utilisation) sport dimensions. Even the design of an event portfolio, according to the framework, reflects the tourist-oriented strategy approach. It seems reasonable to widen research focus of post-event legacy leveraging and include such dimensions as social and business development, urban regeneration strategy, and environmental issues. For instance, the FIFA Soccer World Cup in Germany 2006 produced substantial environmental improvements through a special Green Games Programme, and Manchester's Commonwealth Games 2002 revitalised several deprived districts of the city (Clark, 2008). As Jago et al. (2010) argue, a mega-event should be a part of a long-term development and marketing plan, acting as a catalyst for bringing forward development opportunities.

The understanding of cross-leveraging opportunities and mechanisms within the pre-, during-, and post-event periods could shed the light on the potential of utilisation of one-off large-scale events to capitalise on the host community's capacity and the whole portfolio of different events. Thus, more empirical research is needed to set the ground for serious discussion of event portfolio leveraging and cross-leveraging perspective, particularly in conjunction with staging one-off mega events.

2.7 Designing a portfolio of events

This section outlines the existing academic discourse with regard to event portfolio design. It introduces the concept of design in events studies and examines the existing event portfolio design frameworks and their limitations. The concept of critical mass in portfolios is also presented and analysed.

2.7.1 Design in events

Current discourse in event studies emphasises the integrative role of event design in delivering positive impacts for the event's audience and the host destination (Richards, Marques, & Mein, 2014b). Event design can be seen as a concept of a structure for an event (Berridge, 2012). Richards, Marques, et al. (2014a) argue that designing in events configures the relationships between different event dimensions, stakeholder interests and community perceptions.

As already indicated in the previous sections of this chapter, a growing number of cities have been utilising events as a strategic tool to achieve long-term positive outcomes in the fields of place-making, place identity and destination development. Richards, Marques, et al. (2014a) specify that: "Effective design is not just a means of enhancing the visitor experience or generating more income, but it can become a means of achieving much broader social, cultural and creative objectives" (p.208).

The design of events is becoming an indispensable part of the urban system as a whole (Bevolo, 2014). A new 'caste' of city event designers have emerged; it operates on the intersection between urban policy, spatial planning and cultural and economic development (Richards, Marques, & Mein, 2014c). Public event agencies have started to play an integral role in city event planning and development, linking different spheres of city life. It becomes evident that event design is capable of contributing to the image of the host city, its attractiveness and liveability.

In line with the current tendency to shift focus from single events to portfolios of events (Section 2.4.1), the aspects of portfolio design become increasingly important from both academic and industry perspectives. Richards, Marques, et al. (2014a) point out that at the level of event portfolio:

the need arises to design beyond the confines of the event itself, into infrastructure and orgware (organisational structures and process). Events themselves then become structures, which in turn shape social, economic and cultural practises (pp. 208-209).

The design of a portfolio of events contributes to a city experience-scape (O'Dell, 2005) or even results in the development of distinctive event-scapes (Richards, Marques, et al., 2014a), which are places where the consumption of experiences of pleasure, entertainment and sociability occurs. Ziakas (2014a) argues that the design of an event portfolio is a primary task for city event planners. This process entails strategic decision-

making, portfolio concept development, packaging of events, scheduling the event-related activities, overall portfolio coordination and development of a synergetic value of the portfolio parts.

2.7.2 Event portfolio design frameworks

The analysis of the literature demonstrates an increasing demand for development of a comprehensive event portfolio design framework that explains key processes of portfolio planning and management. One of the first theoretical attempts to conceptualise portfolio design belongs to Getz (1997, 2005, 2008). Getz (2005) groups events by their typology, seasonality, target markets and value for local tourism development. Further on, Getz (2013) suggests several scenarios for portfolio development. Thus, scenario A, where the portfolio is managed for immediate, maximum tourism and economic gain appeals to destinations that are just entering event tourism and tends to put their names on the international event map. Scenario B where a diverse portfolio is managed for long-term, TBL sustainability is a strategy that corresponds to the contemporary paradigm of sustainable urban development. Scenario C focuses on a portfolio, managed for increasing long-term benefits. It concentrates on niche audience markets rather than on mass tourism or mass consumption of the event product. A strong focus provides competitive advantages in branding, promotion and managing of the portfolio. The example of Gothenburg, Sweden, shows that sometimes a city can adopt different scenarios and strategies to fit the current and future vision of urban development. Initially, Gothenburg used sporting events to promote itself as an excellent place for visiting, but recently the city event planners have started to prioritise music and cultural festivals (Smith, 2012).

Ziakas (2007) has contributed to the further development of event portfolio theory. This researcher argues that the creation of an event portfolio should be based on an internal logic that unites different stakeholders and legitimises the portfolio in a host community. The overall purpose of the portfolio should be identified, taking into consideration historical, political, cultural or even existential characteristics of a community. All driving forces that can influence the objectives of an event portfolio should be analysed and discussed among organising bodies and host community stakeholders. An event portfolio approach envisages all different types of events as resources, which can be utilised in line with event strategy. One of the main tasks of portfolio planners is to consider how events complement one another and how these connections can lead to the integrative synergy of events in the portfolio (Ziakas, 2014a).

Events in the portfolio can be integrated and synergised on the contextual, operational and socio-cultural grounds (Ziakas, 2013). Contextual ground deals with the purposes of separate events and general objectives of a portfolio, for example, to celebrate the local culture or to promote local industries or tourist attractions. Operational ground refers to the integration of event elements and instrumental dimensions that enable the portfolio implementation. Such elements can be referred to different sport activities, car shows and games, which are included into the official programme of a particular event. Socio-cultural ground constitutes the conceptual dimensions and symbolic meanings of events from the portfolio, which derive from the dramaturgic essence of the portfolio, such as sense of community or local history. In fact, the common objectives of events, their common elements and sharing resources in the form of venues, suppliers and volunteers demonstrate the place capacity to create a sustainable portfolio of events (Ziakas, 2013).

An event portfolio may comprise of different events according to the current policy agenda in a destination, its economic and social goals. Dragin-Jensen, Schnittka, and Arkil (2016) suggest two ways of portfolio creation: a quality-oriented strategy and a quantity-oriented approach. A quality-oriented portfolio focuses on few but large international events, whereas a quantity-oriented – on diverse but local small-scale events. The criteria for creating or including an event into a portfolio must be corresponding to 1) the main purposes for which the event is going to be organised and to 2) the role of the whole portfolio in the destination development programme (Ziakas & Costa, 2011a). Richards (2015b) discusses a qualitative aspect of event selection. There are iterative and pulsar events. Iterative events bring local people together. They accomplish a maintenance function, strengthening the connections within a community, bonding social capital, preserving traditions and developing a sense of belonging. Iterative events are usually community-owned events, deeply rooted in the community structures. They are not necessarily small events, but events that reflect and regularly celebrate a unique local identity. Pulsar events deliver dynamic changes in the host place; they lead to the development of new structures and networks. They challenge local event industry capacity and may require a significant investment of resources. Pulsar events meet the criteria of large-scale international festivals and sporting tournaments. A creative portfolio design can strategically balance these types of events to provide both iterative and pulsar outcomes as well as diversity of experience and meanings

Prior to decision-making regarding which events to consolidate in an event portfolio, it is crucial to audit the entire population of events in a destination (Getz, 2005; Ziakas,

2014a). Literature suggests that local and regional small and medium events in course of time have the potential to transform into more substantial tourist and investment attractions (Andersson et al., 2013). Hence, the continuous analysis and evaluation of existing local events is a fundamental requirement for the development of a balanced and successful portfolio of events (Getz, 2012b).

The design of an event portfolio is a dynamic process that

entails the strategic decision-making on the events to be included..., involves a meticulous account of the exogenous factors that impact on the event portfolio, which event characteristics should be fostered within the portfolio and which leveraging strategies to be employed (Ziakas, 2014a, p. 163).

Ziakas (2007, 2013, 2014a) proposes a holistic framework for event portfolio design (Figure 2.1). The design of an event portfolio includes strategic decision-making on the selected events and takes into account factors that impact on the event portfolio existence, such as local resources, market demand, competition among events and potential substitute community products, and contingency, which entails environmental and socioeconomic changes or unexpected incidents (Ziakas, 2014a). Events included in a portfolio can play various roles. Getz (2013) suggests that events can be envisaged as attractions, animators, place-marketing tools, image-makers, and catalysts. Along the same lines, Ziakas (2010, 2014a) proposes that a host community can use events in the portfolio for the following purposes: events as core attractions, whilst events are utilised as vehicles for tourism development; events as focal celebrations to generate community development; and as complementary features, wherein events add value, enrich recreational options and act as catalysts for development. There are five key strategic decisions that are necessary to take into account while planning a portfolio, namely reach (what target markets), frequency (how often), size (total number of events), placement (when) and fit (event programming) (Ziakas, 2014a).

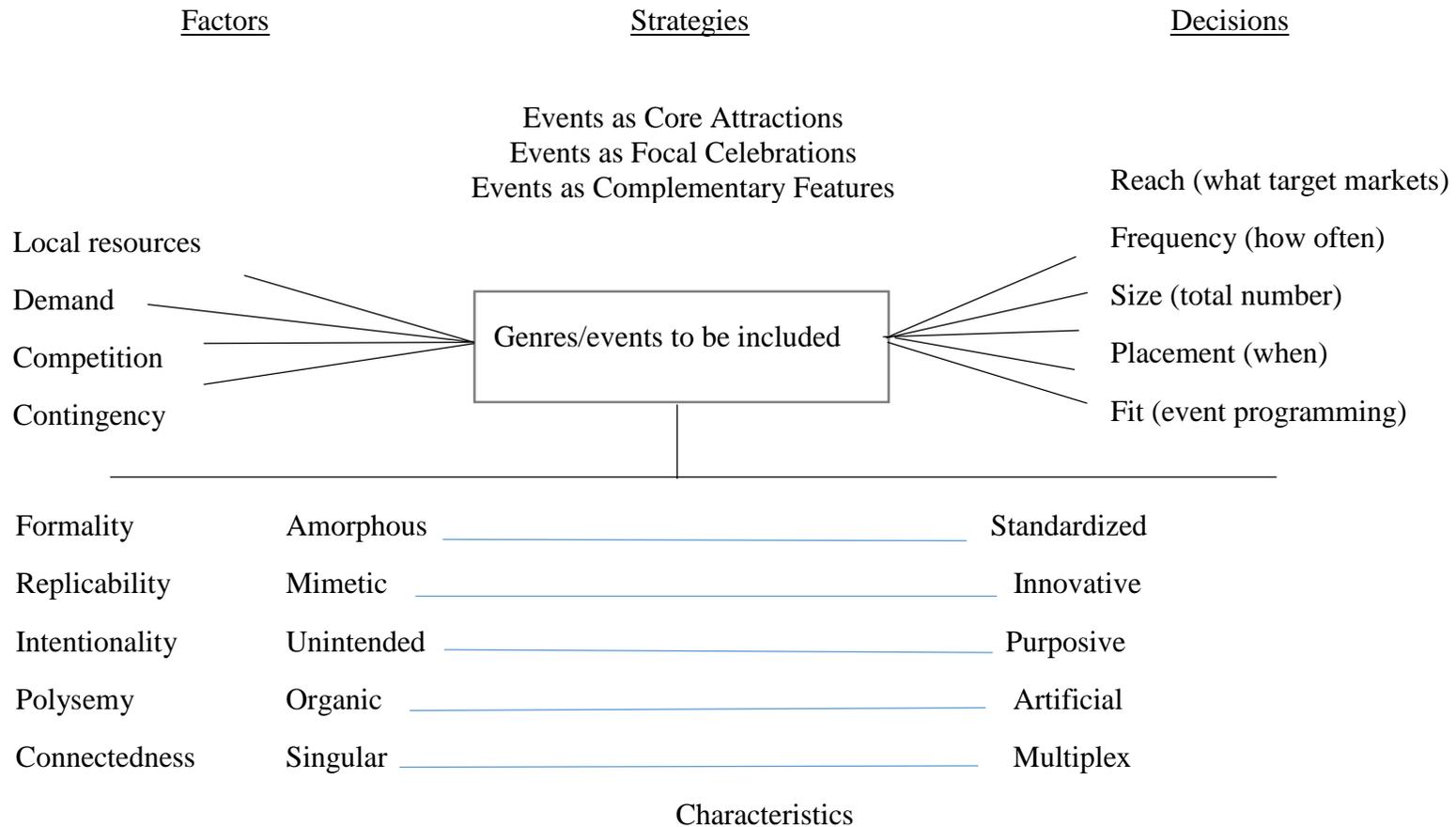


FIGURE 2. 1: EVENT PORTFOLIO DESIGN FRAMEWORK. SOURCE: ZIAKAS (2014A, P. 164)

The composition of an event portfolio is shaped by the cultivation of the following general event characteristics:

- *Formality* refers to the extent to which standardised operating procedures, rules or policies are put in place. This can help with the efficient cooperation and coordination of the event portfolio. A probable disadvantage of this characteristic is that it may result in the loss of creativity and authentic nature of events.
- *Replicability* signifies the replication or imitation of successful event elements within the portfolio in order to guarantee permanent success. The risk that exists is that repetitiveness may lead to the loss of audience.
- *Intentionality* refers to the extent to which all the procedures, activities and portfolio scope are strategic and intended to achieve certain objectives.
- *Polisemy* deals with a variety of symbolic meanings of events and their expression of a host community social order.
- *Connectedness* explores the ways in which events in the portfolio are connected to each other to facilitate its effective management.

The proposed model represents a significant contribution to the ever-growing body of knowledge about portfolios of events. However, the model has some limitations. The conditions of the suggested design have been analysed in a small rural community with a mono-national population. The model does not clearly explain how exactly to proceed with the design of a portfolio, what contextual peculiarities to consider while programming events, what strategies should be used to select events for the portfolio. Since the study by Ziakas (2007) is one of few conducted up to date empirical research on the nature of event portfolios, it is impossible to compare its findings with the results of other relevant studies. Thus, the investigation into event portfolios and design strategies within different contexts and environments is critically important for expanding the current theorisation in regard with event portfolio planning and development.

2.7.3 Critical mass in portfolio design

One of the critical stages in designing a successful portfolio of events is the achievement of a state of ‘critical mass’. Critical mass refers to “minimum portfolio of events, venues, and related investment that is necessary to achieve a permanent, adaptable portfolio and self-sustaining growth in net benefits” (Getz, 2013, p. 150). Although no research has

been conducted to explain the essence of the critical mass of events in event destination, Getz (2013, pp. 150-151) suggests a list of starting points for empirical testing, including:

- A basic level of event venues required for hosting different events;
- A basic number of permanent and one-off events in the city which guarantee the achievement of critical mass;
- Collaboration of key stakeholders, including partnership between government and private sector;
- Legitimation which refers to “the process of making investment in events and venues desirable because of demonstrated benefits”;
- Successful track-record in bidding and hosting major events.

One of the key factors of a critical mass is the number and variety of events included in a portfolio, their interrelationships and strategic roles. The main task for the portfolio managers is to understand what types of events should be included and how they should correspond to the current political, economic or cultural agenda of a destination. Collaboration of stakeholders plays a vital role as it guarantees the support and share of expectations from all interested actors in city event industry. The state of critical mass might be seen as a good starting point for measuring achieved outcomes, reformulating city objectives with regard to events and setting new priorities and indicators of success. The evaluation of the whole portfolio of events calls for the development of new domains and methods that should connect portfolio design with the principles of sustainable development.

2.8 Justifying research objectives

The literature review emphasises the necessity of a holistic examination of the critical aspects of event portfolio approach and portfolio design. The chapter demonstrates that the concept of event portfolios is still in its infancy, with a lack of theoretical and empirical research. Whilst some foundations and integrative theoretical frameworks have been proposed, the absence of sufficient practical evidence makes it difficult to accept and support any suggested approaches and models. This section summarises the literature review. It highlights core areas of portfolio research and discusses identified gaps. The research objectives are formulated and justified.

Area 1. Public sector institutional and policy contexts and their influence on event portfolio. Section 2.3 highlights the necessity of the development of a clear strategic vision for events and their role in city development. A well-coordinated event policy is required in order to consolidate a local event industry and guide the realisation of sustainable strategies and initiatives. Inter-organisational relationships and stakeholder networking discussed in Section 2.4 represent one of the key components of policy-making in a city that intends to use events strategically.

Event portfolio is considered as an opportunity to synthesise objectives, goals, and stakeholders and to coordinate the realisation of sustainable approaches. The discussion in Sections 2.5 and 2.6 summarises key theoretical underpinnings concerning the value of strategic grouping of events and their leveraging qualities. The literature suggests that a portfolio approach provides host cities with a strategic asset. This asset can be utilised to amplify visitation, to diversify city tourism and event product, and to realise long-term legacy and leveraging plans. What is missed in the current discourse is the empirical analysis of local public contexts and their influence on the nature of applied portfolio strategies. This leads to the formulation of the first objective of the present research:

Research objective 1: To understand the commonalities and differences in public sector institutional and policy contexts and their influence on the realisation of event portfolio approaches in Auckland, Wellington and Dunedin.

Area 2. Underlying layers and key dimensions of portfolio design. The second large area of event portfolio knowledge focuses on portfolio design, including rationale for events programming and strategies that can be used in order to construct a successful portfolio of one-off and recurrent events. This literature review reveals the existence of deep connections between events and host cities, which is expressed in the concepts of place-making, competitive identity and eventfulness.

As demonstrated in Section 2.2, events can contribute significantly to city development, delivering positive outcomes and constructing desirable city profiles. Major events can play a unique role in the construction of city prosperity through attracting visitors, building a positive image of a host city, and integrating various community groups and other relevant stakeholders. Eventfulness manifests itself in a holistic strategy that directs a purposeful production and programming of events. Although the discussed research area has received sufficient attention in the literature, more empirical evidence is required

to understand a strategic rationale for portfolio planning. The second objective fills this gap and is formulated as follows:

Research objective 2: To identify the underlying layers of event portfolio planning in the three cities under study.

The analysis in Section 2.7 states that events which have been selected for an event portfolio should have a strong symbiotic relationship with the place they are being staged in. Each event should strengthen a sense of place and the location should help to distinguish the event (Richards & Palmer, 2010). One of the main tasks of portfolio planners is to consider the ways in which events complement one another and the way these connections can lead to the integrative synergy of events in the portfolio and leveraging perspectives. Although Section 2.6 examines current portfolio design frameworks, it concludes that there is a lack of empirical research in this area. It is still unclear how different cities succeed in constructing valuable and distinctive portfolios of events and what principles are centred to the composition of portfolios.

Another issue relates to the synergetic value of the portfolio. There is still no research that explains the development of synergy within portfolios of events. As was also highlighted in Section 2.6, attention should be paid to the interplay of different factors that influence the design process. However, the nature of such factors and their effects are still a neglected area in event portfolio studies. In this regard, the third objective of this research is:

Research objective 3: To examine the key areas of event portfolio programming in the cities under study.

Area 3. Strategic processes of portfolio design. The fourth and final objective of the research has emerged to fulfil the existing demand in a cross-case synthesis of different event portfolio designs, with a key purpose of identifying and explaining the core processes that shape planning and development of portfolios. Ziakas (2014a) notes that the critical inquiry into the design process of event portfolios can substantially extend the scope and focus of event studies and event management. The portfolio design is a dynamic process, never static, nor complete, which evolves and adjusts according to the contextual changes (Ziakas, 2014a). The fourth objective is formulated as follows:

Research Objective 4: To develop a model and explain core strategic processes of event portfolio design in Auckland, Wellington and Dunedin.

Overall, the literature review covers all the relevant topics for this research. It explains the interconnected relationships between different areas of event portfolio studies and justifies the theoretical and practical value of the formulated research objectives.

2.9 Summary of the chapter

This chapter presented a thorough discussion of the literature on event portfolios. Firstly, the role and impacts of events on place-making, competitive identity and formation of city eventfulness were explained. After that, the chapter focused on the public policy perspectives of events and inter-organisational relationships within the event sector. Next, the strategic value of event portfolios and their leveraging potential were discussed. The review also explored key aspects of event portfolio design. Several portfolio design frameworks and their limitations were presented. The chapter concluded with the discussion of the identified gaps in the literature and proposed four objectives of this research. The next chapter will outline and discuss the research design.

Chapter 3: Research Design

3.1 Introduction

The aim of this chapter is to explain and justify the adopted research design. The first part of the chapter discusses ontological, epistemological and methodological perspectives of the study. Links between critical realism, pragmatism and qualitative multiple case-study are presented. Next, the rationale behind selection of the cases is explained. This is followed by the discussion of the selected sources of evidence, including semi-structured interviews and documentation. After that, the chapter focuses on data collection and data analysis techniques. All the applied stages of thematic analysis are outlined and explained. The chapter concludes with the discussion of the applied interpretation strategy, validity construction and ethical considerations of the research.

3.2 Determining the research paradigm

In general, the research paradigm sets the context for any research investigation (Ponterotto, 2005). It is determined by the interconnectedness of ontological, epistemological and methodological premises of the researcher (O'Reilly & Kiyimba, 2015). This section will discuss the adopted perspectives of critical realism as ontology, pragmatism as epistemology and qualitative multiple case-study as methodology.

3.2.1 Ontological perspective of critical realism

Ontology is defined as “assumptions and beliefs we hold about reality and, more specifically, about the reality that is the object of research” (Biesta, 2010, p. 102). The researcher’s ontological position rests on the premises suggested by critical realism. It is widely acknowledged that Bhaskar’s philosophical works have established and developed key principles of this approach (Elger, 2010). Bhaskar’s (2012) main argument rests on the compatibility between ontological realism and epistemological relativism, pluralism and diversity. Critical realists retain the position that there is a real world ‘out there’ that exists independently of our perceptions, theories or constructions (Maxwell, 2012). This world is structured, differentiated and changing (Bhaskar, 2012). However, critical realists accept the possibility of different valid perspectives on any event or phenomenon in this world. As Lakoff (1987) states: “...there can be more than one scientifically correct way of understanding reality in terms of conceptual schemes

with different objects and categories of objects” (p. 265). Theories about phenomena in a real world might change (for example, man’s belief that the earth was flat), however, this does not mean that reality itself would be changed (the actual change in the shape of earth) (Bazeley, 2013; Sayer, 2000).

From the position of critical realism, the ideas, meanings, feelings and intentions held by an individual are treated equally real to physical objects, processes and events (Maxwell, 2012). Maxwell (2012) supports the idea that beliefs and perspectives of an individual are always influenced by the physical context in which this individual acts. These two separate entities (beliefs and the context) causally interact with one another.

Critical realists in social sciences direct their research inquiries to the objects which already exist and are defined in certain ways in the world of everyday life. The possible goal of a researcher in this case is to re-describe these objects and explore their complexity, taking into account the influence of internal and external environments (Outhwaite, 1998). It is necessary to explain observed events or phenomena, to identify mechanisms, processes and structures that account for them (Bazeley, 2013).

The ontological position of critical realism provides the researcher with a framework according to which a portfolio of events is envisaged as a complex phenomenon of a real world, with its realist’s characteristics of structure, diversity and changeability. Portfolio of events is real in at least two senses: first, as an actual conception or plan for hosting and managing events in a city and second, the design of a city’s event portfolio is itself a real process, which appears in a real context, real timeframe with real consequences.

3.2.2 Epistemological perspective of pragmatism

Epistemology refers to how we gain knowledge of what exists in reality, in other words, how we can know anything (Maxwell, 2012). Epistemologically, this research adopts pragmatism, which deals with how knowledge, ideas and different activities are developed and realised through the day-to-day creativity of human beings, while they are dealing with the never wholly knowable world (Watson, 2013). As a philosophical doctrine, pragmatism descends from the works of Charles Sanders Peirce (1839-1914), William James (1842-1910), John Dewey (1859-1952) and George Herbert Mead (1863-1931).

It is necessary to clarify the distinction between pragmatism, which refers to the research epistemology, and pragmatic approach, according to which action is not to be guided by prior principles but by opportunities and constraints of the current situation in a given context (Baert, 2013). In this case, for example, it is possible to talk about a pragmatic state foreign policy or a pragmatic business strategy. Some researchers label their scientific investigations as pragmatic, arguing that the aim of pragmatism is to identify the best understanding of a problem, regardless of ontological, epistemological or methodological constraints (e.g., Albrecht, 2010; Pansiri, 2006). Patton (2002) supports this trend, arguing that pragmatic research allows “to eschew methodological orthodoxy in favour of methodological appropriateness as the primary criterion for judging methodological quality, recognising that different methods are appropriate for different situations” (p.72). Baert (2013) proposes a special term for this methodological opportunism - a ‘pragmatic attitude’, to distinguish it from ‘pragmatist’ argument. The former implies that the choice of theories or research techniques depends on the particular topic or situation which is under investigation. The latter represents a well-articulated philosophical or theoretical position.

Pragmatism rejects the ‘mirror’ view of knowledge, where knowledge is conceived as a passive fixation of the manifestation of the external world (Baert, 2013). Process of knowing is the mode of experience that supports human actions. Experience, in turn, is a transaction of living organisms and their environment (Biesta, 2010). Transaction observes an actor in connection to the whole process “inclusive of all its ‘contents’” (Dewey & Bentley, 1949, p. 114). The concept of transaction corresponds to Mead’s (1974) idea that mind arises in the social process only within the empirical matrix of social interactions, when actors are continuously developing meaning through the interpretation of the confronting situation and construction of a responsive action (Mead, 1974).

Knowledge is a social phenomenon if ‘social’ is implicated as ‘interactive’ (Longino, 2002). People interact with each other, develop and share knowledge as a collective effort and a collective product (Greenwood, 1991). This means, that in order to get knowledge we need action. Apart from action, we also need thinking and reflections. The combination of these activities (action, thinking and reflection) leads to knowledge (Biesta, 2010). Dewey (1929) argues that knowledge is instrumental in its nature and is concerned with conditions and consequences of human experience. The meaning of

'knowledge' includes truth of the content (Longino, 2002). Consequently, the meaning of truth is correlated to the investigator's current demand in the problem solving process.

Pragmatist's truth is always constructed as a by-product of the problem solving process (Hickman, 2009). The pragmatist concept of truth can metaphorically be explained as the fit between a key and a lock. There is no absolute key that fits all locks. In order to find an appropriate key, objective conditions must be taken into consideration (Hickman, 2009). In this sense, knowledge is always a human construction (Biesta, 2010). This does not mean that everything is possible. What makes beliefs and statements about reality successful is their agreement with reality (Slater, 2008). Reality can resist or 'talk back' (Blumer, 1969) in order to challenge and test the validity of our perceptions.

Pragmatist knowledge is partial and limited to the knower's geographical location, historical background, or point of view, shaped by a particular set of knowledge production practice. At the same time, knowledge is plural, as there may be multiple epistemically acceptable sets of practises, capable of producing knowledge of the same phenomenon. Different investigators may be differently situated and motivated by different goals (Longino, 2002). Finally, no knowledge claim is free from the possibility of challenge and revision. The validity of knowledge can be taken for granted until a problem arises that cannot be solved in terms of it (Berger & Luckmann, 1967). Thus, knowledge is continuously updated in the light of new experience and is always in a state of becoming (Jackson, 2013). The inquirer should be attentive to the experience over time as knowledge is always fallible and results of inquiry can be corrected due to the appearance of new circumstances or changes in the observed environment (Anderson, 2006).

The aim of a pragmatist research is to concentrate on the action-oriented approach and become a resource for informing human practices, suggesting possibilities for solving concrete social problems (Powell, 2001). Pragmatist research on event portfolios can be effective in informing a 'community of inquiry' (Rumens & Kelemen, 2013) about strategies that can be adapted by other researchers or practitioners who pursue their own academic research or managerial projects. For example, the results of the research into the ways of designing event portfolios might be significantly productive in terms of insight into the practice of event policy making and event portfolio strategy implementation.

Pragmatically, it is always important to understand the contextual conditions under which knowledge has been created. This does not mean that the result of inquiry from one situation within a particular context cannot be useful for other situations in different contexts. However, the transfer of produced knowledge to another setting should be based on understanding of differences between the particular setting and those where knowledge was produced (Greenwood & Levin, 2008). As Biesta (2010) concludes, transferred knowledge may guide observations and perceptions as well as suggest possible ways for resolving problems, but whether these possibilities will address particular problems in new situations and contexts can be discovered only through the application process.

3.2.3 Methodological perspective of a qualitative multiple case-study approach

Methodology is understood 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” (Crotty, 1998, p. 3). The research adopts methodological principles suggested by a qualitative case-study approach.

The word ‘qualitative’ stresses the meanings of processes and qualities of entities that could not be experimentally measured in terms of quantity or frequency. Qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them (Denzin & Lincoln, 2000). As Miles and Huberman (1994) notice “Qualitative data are sexy. They are a source of well-grounded, rich description and explanations of processes in identifiable local context” (p.1). The aim of this research is to explore the complexity of event portfolio design in several cities in New Zealand. Thus, the qualitative approach in this study seeks to understand the reality through investigating and in-depth description of the core aspects and processes that constitute the portfolio design. It is unlikely to achieve the result utilising quantitative methodology.

Some researchers consider case-study as a research method (e.g., Crotty, 1998; Yin, 2014) or a choice of what is to be studied (e.g., Stake, 2008). In this research case-study is understood as a methodology, a type of design in qualitative research in which “the investigator explores a bounded system (a case) or multiple bounded systems (cases) over time through detailed, in-depth data collection involving multiple sources of information” (Creswell, 2007, p. 73). Case-study investigates a contemporary

phenomenon within its real life context (Dul & Hak, 2008; Yin, 2014). It captures the dynamics of the studied object (Eisenhardt, 1989). This kind of research methodology is appropriate when the inquirer seeks for better understanding or providing insight into a particular issue (Stake, 2000). Case-study methodology has been actively utilised by researchers in event studies who aim to holistically analyse the political, economic and institutional dimensions of events planning and development (e.g., Foley, McGillivray, & McPherson, 2012b; Foley, McPherson, & McGillivray, 2008; Stokes, 2008).

Stake (2008) identifies three types of case-study, namely intrinsic, instrumental and multiple case-studies. Intrinsic case study is usually undertaken to learn about a particular singular case. An instrumental case study is used to gain insight into a particular issue which is under investigation. In order to extend the investigation of a phenomenon to several different contexts a researcher can utilise a multiple case-study. This variant has been chosen as a preferable one for the research. One of the important reasons for conducting a multiple case-study of event portfolios in cities in New Zealand is to explore how associated strategies and initiatives perform in different contexts (Stake, 2006). The advantage of a multiple case-study approach is that it helps to avoid the vulnerability of a single case-study outcomes (Yin, 2014) and produces a broad and detailed analysis of the research phenomenon.

One of the potential limitations of the case-study methodology that is often discussed in the literature is the impossibility to generalise on the base of a research (Simons, 2014; Stake, 1995). Flyvbjerg (2011) sees this position as one of the misunderstandings that undermine the credibility of this methodology. This author argues that “formal generalisation is overvalued as a source of scientific development whereas the ‘force of example’ and transferability are underestimated” (p. 305). The obligation of a researcher in a case-study is not always necessarily to generalise findings but to demonstrate the transferable potential of the results and their application in other contexts (Simons, 2009).

From the pragmatist perspective where knowledge is always context-dependent (Section 3.2.2), it is possible to emphasise at least two ways of generalisation that are appropriate for this study. These are a *cross-case generalisation* and a *concept generalisation* (Simons, 2009). In a cross-case generalisation, common issues and themes may be identified and interconnections between them may be constructed. Thus, a general proposition across cases may derive. It is important that this is not a

propositional generalisation for a wider population but only for particular cases under study.

As a researcher interprets and analyses the data from a particular case, a theory of this case begins to emerge. Theoretical concepts, which have been constructed through this process, are relevant to this one case, but they might have equal significance in other cases within different context. This is a concept generalisation, which is relevant for both single and multiple case-studies. A case-study research should not be evaluated in terms of the universality of the theory, but rather in terms of contribution to contextual insights (Järvensivu & Törnroos, 2010).

In brief, critical realism, pragmatism and qualitative multiple case-study approach have been considered as an appropriate ‘interpretative framework’ (O’Reilly & Kiyimba, 2015) for this thesis. The critical realist position seeks for the exploration and explanation of a real world phenomenon, which is portfolio of major events. The applied ontology accepts that there can be multiple perceptions and understandings of this phenomenon depending on the context. As epistemology, pragmatism supports the diverse interpretation of existing reality suggested by critical realism and calls for the development of useful knowledge that facilitates problem solving in different circumstances. Multiple case-study methodology provides a solid basis for knowledge creation and transferability, involving analysis of multiple variations of event portfolios in different urban settings.

All three dimensions of ontology, epistemology and methodology reflect the researcher’s analytical perspective and set the pace for the research design, including selection of appropriate cases, identification of the relevant sources of evidence, data collection and data analysis techniques. The following sections will explicitly outline and discuss all these stages.

3.3 Rationale for case selection

As previous sections indicated, this research applied the multiple case-study methodology. The unit of analysis or the main focus of case-study (Yin, 2014) is event portfolio design activities and initiatives that determine its nature, strategic objectives and compositional structure. Portfolio design was analysed from the perspective of those public organisations and agencies that were expected to contribute significantly to major event planning and development in various cities in New Zealand.

In a multiple case-study, each of the cases should serve a particular purpose or, in other words, follow a replication logic (Yin, 2014). Replication logic means that certain cases might be chosen with the expectation of similar results for predictable reasons (Yin, 2014). This is a literal replication. Some cases might be chosen for expected differences. This is a theoretical replication (Eisenhardt, 1989; Yin, 2014). The three selected cases were drawn from Auckland, Wellington and Dunedin. The expected similarities and differences derived from the contextual environment in the cities, including their size, institutional arrangements and event policy frameworks (Table 3.1). The format of case presentation in Table 3.1 was adapted from Stokes (2003) as it efficiently outlines similarities and differences, derived from the contextual environment in the cities, including their size, institutional arrangements and event policy frameworks.

TABLE 3.1: AN OVERVIEW OF THE SELECTED CASES (ADAPTED FROM STOKES (2003))

Case	Aspect of the contextual environment			Theoretical replication: Aspects a, b and c	Literal replication: Aspects a, b and c
	a. Size	b. Institutional arrangements	c. Event policy framework		
Auckland	Large (1,415,500 residents)	Established in 2010, ATEED (Auckland Tourism, Events and Economic Development) is a leading public agency in the major events sphere. Responsible for major events programming and management. Local and regional events are under the jurisdiction of the Auckland Council.	Solid basis for planning and realisation of event-related initiatives in the city: <ul style="list-style-type: none"> • Auckland major events strategy • Auckland major events protocol • Auckland event policy • Auckland business events plan 	a. differs from other cases b. differs from Dunedin c. differs from other cases	b. similarities with Wellington
Wellington	Medium (190,957 residents)	Until 2014, Wellington City Council was responsible for the planning and development of local, regional and major events. In 2014, WREDA (Wellington Regional Economic Development Agency) was established. Major events team was relocated from the council to WREDA.	One document regulates both major and smaller local and regional events: <ul style="list-style-type: none"> • Wellington event policy 	a. differs from Auckland b. differs from Dunedin c. differs from Auckland	a. similarities with Dunedin b. similarities with Auckland c. similarities with Dunedin
Dunedin	Medium (120,249 residents)	Dunedin City Council delivers major, local and regional events. A new economic development agency, Enterprise Dunedin, was established in 2014. The agency is not involved in major events programming.	One document regulates both major and smaller local and regional events: <ul style="list-style-type: none"> • Dunedin festival and events policy 	a. differs from Auckland b. differs from other cases c. differs from Auckland	a. similarities with Wellington c. similarities with Wellington

To begin, the cases can be compared in their size. Auckland is the largest city in New Zealand, whereas Wellington and Dunedin can be treated as medium-sized cities by New Zealand standards. The size of a city influences its financial and resource opportunities and industry capabilities while planning and delivering programmes of public events. It also affects the measures of event success and audience numbers.

In relation to current institutional arrangements, Auckland and Wellington demonstrate similarities, where semi-dependent public agencies, ATEED and WREDA, have been authorised to run and manage major events. City Councils in these cities continue to plan and deliver smaller community and regional events. The situation in Dunedin differs. The City Council events team is responsible for the programming of all public events, including major, local and regional.

The event policy framework in Auckland differs from the other cities. The city is notable for its well-developed pool of policies, strategies and other regulations that guide the development of the event industry in the city. Wellington and Dunedin, on the contrary, operate within a less-developed framework, where only one public document regulates the event sphere.

The identified parameters of the applied replication logic provided this research with an expected variability in terms of major event programming and portfolio planning. This causes a situation where the selected cases are likely to replicate or extend the emerged theorisation (Eisenhardt, 1989) on event portfolio design in cities in New Zealand.

3.4 Sources of evidence

It is expected that a qualitative researcher should draw upon multiple, at least two, sources of evidence in order to seek convergence and corroboration in the data and reduce the impact of potential biases that can emerge when only a singular method is used (Bowen, 2009). Most common sources of evidence which are used in case-studies are documentation, archival records, interviews, direct observations, participant-observation and physical artefacts (Yin, 2014). Since the researcher's intention was to collect information regarding current decision-making, planning and development of portfolios of events in the three cities in New Zealand, the study adopted two sources: interviews and documentation. The following sub-sections will discuss the peculiarities of these sources in detail.

3.4.1 Semi-structured interviews

Interviewing may be defined as a conversation with the specific purpose to gather information (Berg, 2007). Interviewing is one of the most important sources of evidence for case-study (Yin, 2014). By using interviews, a researcher can reach otherwise inaccessible areas of reality such as participants' subjective experiences, attitudes and meanings (Perakyla & Ruusuvuori, 2011). During the interview interaction, a researcher and participants are constantly doing analysis and collaborating in meaning-making and producing knowledge (Gubrium & Holstein, 2002). The literature suggests a common distinction between structured (standardised), semi-structured (semi-standardised) and unstructured (unstandardized) types of interviews (Berg, 2007; Bryman, 2012).

In a structured interview, a participant is asked a series of pre-established questions with a limited number of response categories (Qu & Dumay, 2011). This is a very standardised method, along the lines of a formal survey which is usually used in quantitative studies (Yin, 2014). Although such interviews are useful for some research purposes, they are passive recordings of participants' opinions and "do not take advantage of the dialogical potential for knowledge production inherent in human conversations" (Brinkmann, 2014, p. 286).

At the other end of the continuum of interview types lies unstructured interview, the most open-ended approach, which offers maximum flexibility to pursue information and does not require a predetermined set of questions (Patton, 2002). This type has its roots in the tradition of open-ended ethnographic interview (Qu & Dumay, 2011). Time-consuming and difficulties with the analysis of the unstructured amount of data are the main weakness of this type of interviewing.

Semi-structured interview combines the characteristics of both previously described types. It provides a flexible guide or schedule around a list of topics without fixed wording or predetermined order of questions (Minichiello, 1995). A researcher is flexible to probe, explore and ask additional questions, discovering the subject area in-depth (Patton, 2002). Brinkmann (2014, p. 288) summarises several key aspects of the semi-structured qualitative interview. First, it is always structured by the researcher's *purpose* of obtaining knowledge. Second, it revolves around *descriptions* made by interviewees. These descriptions are about *life world phenomena*. Finally, understanding the meaning of the descriptions involves some kind of *interpretation*.

Semi-structured interview fully meets the stated research objectives and fits the ontological and epistemological perspectives of the researcher. Thus, semi-structured interviews with city event planners are seen as a sufficient source of the research data that covers such areas as public event programming, event portfolio planning and development, and elaboration of city event strategies. From the ontological perspective of critical realism, such interviews allow the researcher to capture the diverse characteristics of a real world phenomenon that is a portfolio of major events from the point of view of different public actors involved into the portfolio planning. The developed interview guide in this case focuses both the researcher and participants on a concrete problematic situation and the ways to deal with it. The data obtained from the semi-structured interviews with regard to event portfolio development can be used as a pragmatist arsenal for knowledge development. The produced knowledge is always interactive and directed to solving the discussed problematic situations.

3.4.2 Documentation

Documents contain text and images that have been produced without a researcher's intervention (Bowen, 2009). Documents relevant to the research objectives may provide background and context for the study, supplementary research data, as well as can generate new research questions (Bowen, 2009). For example, the analysis of city event policies and strategies may help the researcher to understand the historical and political roots of certain decisions in regard to hosting major events in the three cities under study. Information derived from documents can become a valuable supplement to a developing knowledge base, highlighting some additional issues that have not been described by the participants in the interviews. Insights from the documentation can suggest additional questions to be asked during semi-structured interviewing of city event planners concerning the cities' strategic vision on events and implemented initiatives and tactics.

Literature allows summarising some critical strengths and weaknesses of this type of data source. Firstly, it is stable, and can be reviewed repeatedly (Bowen, 2009; Yin, 2014). Secondly, documentation provides a broad coverage; it covers many settings, events and processes (Bowen, 2009). Thirdly, documents are specific. They contain exact names, references and details (Bowen, 2009; Yin, 2014). The limitations of documentation include, for example, its insufficient detail for a research project

(Bowen, 2009). Documents' low retrievability is another challenge. As Yin (2014) notes, sometimes it is hard to find relevant documents. Access to documents may be also intentionally blocked.

In brief, documents have been seen as a solid data source for this study. Official documents and records on city events planning and development provide a 'behind-the-scenes look' (Patton, 2002) at event portfolio design and conceptual debates as they relate to the principles of portfolio formation and the implementation of appropriate initiatives. Documents such as officially published city event policies and strategies, marketing and activity plans, agendas and minutes of meetings and annual reports, have been considered by the researcher as an excellent basis for document analysis. Such a wide spectrum of documentation helps the researcher to "uncover meaning, develop understanding and discover insights" (Merriam, 1988, p. 118) in order to answer research questions and achieve the research objectives. A systematic review of public documents served to ground the research in distinctive contexts in Auckland, Wellington and Dunedin. The researcher also used documents for pre- and post-interview situations (Bowen, 2009) when the information from documents was used to check interview data and vice versa.

To sum up, two sources of evidence have been chosen for this research. These are semi-structured interviews and documentation. Both sources are able to provide a sufficient base for data analysis within the identified research paradigm and conceptual framework. The next section focuses on the data collection peculiarities and issues.

3.5 Data collection

Pragmatist approach suggests that data should be seen as a relation between the researcher, research issues and the research context (Strubing, 2007). In this case, data collection takes a form of a strategic intervention into the field with a particular goal to obtain a valuable set of information that focuses on the stated problematic situation and the ways to improve it within the particular context. For the purposes of this study, it was vital to collect and analyse the perspectives of public event planners with regard to the event portfolio design patterns. Therefore, interviewing was considered as a primary data collection method. Primary data is understood here as information that is collected for the first time from the real world in the form of interview answers (Brotherton, 2015). Document selection was a complementary or secondary data collection method. Secondary means the type of information that was originally produced by someone else,

for example, by city councils or public event agencies. This section provides an overview of sampling techniques and already mentioned data collection procedures.

3.5.1 Sampling of respondents

A purposeful approach to the selection of interviewees (Bogdan & Biklen, 2003) has been applied in this study. Only those participants “who best fit the purpose of the research” (Harding, 2013) were interviewed. Such participants were in a position to make meaningful comments on current issues pertaining to event policies and strategies in the destinations under study. The researcher aimed to interview the representatives of the public sector event agencies, council event divisions, city marketing authorities and event advisers. As the main intention was to understand and theorise the official city vision and strategic approaches to event portfolio design, other relevant to the research topic stakeholders such as event organisers, community representatives and professional associations, that is individuals and groups who were not directly involved in decision-making, were not invited to participate in the research. The key rationale for this choice was that city event managers and planners were more likely to be well informed and prepared to comment on public documents, current event strategies and event-related initiatives. In addition, with the intention to broaden the sample, several industry experts (CEOs of event companies) who previously worked for city councils or CCOs and were involved in event portfolio design were invited to participate.

As a result of such deliberate delimitation, the pool of would-be interviewees was significantly narrowed. In particular, this was relevant to Dunedin and Wellington, where city events’ teams consisted of only few event managers. Such a research situation called for a ‘less is more’ approach (McCracken, 1988) when it is more beneficial to work intensively with a few people who possess required experience and expertise, than to interview many managers with partial knowledge.

In total, thirteen participants took part in this research: six in Auckland, two in Wellington and five in Dunedin (Table 3.2). Some respondents were interviewed twice in order to get more insights and clarify emerged issues. Overall, seventeen interviews were recorded. This number meets the requirements for the achievement of saturation in qualitative research (Guest, Bunce, & Johnson, 2006; McCracken, 1988).

TABLE 3.2: A SAMPLE OF INTERVIEWEES FOR THE RESEARCH

Position (generic titles)	Number of Interviews	Gender	Age
Auckland			
Manager, City Events	2	male	30-40
Manager, Event Development	1	female	30-40
Manager, Event Feasibility	2	female	30-40
Manager, Business Events	1	female	40-50
Manager, Events and Community Development	1	male	50-60
Business Consultant, Major Events	2	male	50-60
Wellington			
Manager, Community and Regional Events	1	female	30-40
Manager, Major Events	2	male	30-40
Dunedin			
Manager, City Events	1	female	40-50
Senior Adviser, Community Events	1	male	30-40
Manager, Brand and Tactical Marketing	1	male	30-40
Advisor, Culture and Arts	1	female	30-40
Policy Planner, Community Development	1	female	40-50

As Table 3.2 demonstrates, the interviewees held senior event-related positions in their organisations which provided them with authority to make decisions and regulate a public event domain in the cities. Six of the participants were male and seven – female. The majority of the interviewees belong to the 30-40 age group.

3.5.2 Interviewing city event planners

Because of a quite ‘high’ level of the respondents’ decision-making status within their organisations, as well as some access barriers (e.g., names and contacts were not in the open access), the researcher applied recommendations and guidelines for elite interviewing (e.g., Darbi & Hall, 2014; Harvey, 2011; Mikecz, 2012; Ostrander, 1993; Stephens, 2007). In this research elites have been understood as individuals who are “either key decision-makers and/or had a major influence” (Mikecz, 2012, p. 485) with regard to major event planning and management in the cities under study. The process of interviewing entailed the following stages: 1) gaining access; 2) pre-interview

preparation; 3) interview facilitating techniques; and 4) post-interview follow-up. These stages are discussed below in detail.

3.5.2.1 Gaining access

As literature suggests, gaining access to elites might be very difficult and time-consuming because of barriers established to divide elites from non-elites (Welch, Marschan-Piekkari, Penttinen, & Tahvanainen, 2002). While negotiating face-to-face semi-structured interviews, the researcher applied a two-phase strategy. During the first stage, potential participants were identified through scanning of the websites of the relevant public organisations. Often it was possible to find either only names without any contact details, or just general contacts of a responsible department.

After that, the researcher followed the recommendation of the Auckland University of Technology's Ethic Committee (AUTEK) and sent a letter requesting permission to conduct the research (Appendix 1) on general e-mails of the organisations. Some of the e-mails were addressed to the so-called ultra-elites, the most highly placed managers (Mikecz, 2012). In one to two weeks, the researcher received positive responses from the majority of the organisations in the name of the top-ranked managers. Moreover, some of them also agreed to be interviewed and expressed their interest in the results of the study. The researcher agreed to share the findings and, should it be necessary, to make a presentation of the research. In the literature, such a decision meets the requirements of the reciprocity tactic of elite access (Shenton & Hayter, 2004). All the collaborating organisations provided a list of potential interviewees. This widened the previously prepared contact list. In Dunedin and Wellington City Councils, contact persons were appointed to facilitate the communication with the participants and manage the schedule of the interviews.

During the second stage, the participants were contacted directly, referring to the received official permission. Following the advice to gain the trust of the elite participants at the earliest stage (e.g., Harvey, 2011), the researcher provided the potential interviewees with the following information: personal presentation, nature and scope of the research, duration of the interview, nature of the questions, and ethical considerations (Appendix 2,3). When necessary, the researcher made a phone call in the following few weeks to discuss the possibility of an interview (Stephens, 2007). However, generally, the majority of the participants positively responded in one to three

weeks, suggesting suitable time, dates and sometimes the names of other colleagues who might be interested in the topic of the research.

Overall, the applied approach that included an official request for permission to conduct a research within the organisation, provision of the potential respondents with the ‘full picture’ of the research and the researcher’s readiness to share and present the results of the study, determined a relatively easy and successful access to the research field.

3.5.2.2 Pre-interview preparation

The researcher’s experience confirms and supports the existing argument in favour of the necessity of the pre-interview thorough preparation (Mikecz, 2012; Welch et al., 2002). A semi-structured interview guide (Appendix 4) was developed after the extensive review of the literature and relevant city documents. Such pre-interview work allowed to include some specific questions to get a ‘behind-the-scene’ understanding of some of city initiatives. The key topics always remained the same, including ‘the nature of the event portfolio in the city’, ‘key criteria for event selection, ‘portfolio development and management’. However, taking into consideration different contexts (three cities with distinctive objectives, city capacity and funding opportunities) as well as new emerged ideas, new questions were added to the guide.

Darbi and Hall (2014) highlight the value of a thorough appreciation of the backgrounds of the interviewees. Prior to the interview, the researcher scrutinised the profiles of the respondents in a business-oriented social networking service LinkedIn, read available online interviews and presentations with those people. The obtained information was used to make references to the participants’ past experience and completed projects in order to build a well-disposed atmosphere.

Mikecz (2012) advises to exhibit knowledgeability of the current situation in the industry while interviewing elites. The demonstration of the in-depth knowledge of the current event-related initiatives, mass-media reaction and emerged issues helped the researcher to establish trust and esteem. The interviewees appreciated the researcher’s ability to argue and produce reasons within the city context.

Overall, the intensive preparation for an interview with elites proved itself as a critical success factor. It demonstrated the researcher’s knowledgeability and commitment. It also facilitated gaining the respondents’ trust and sympathy.

3.5.2.3 Interview facilitating techniques

Each interview lasted between 40 and 75 minutes. The duration of interviews in some cases was governed by the talking style of the respondents. Some of them spoke fast and laconically. However, that did not negatively influence the depth of discussion. During the interviews, the following strategies have been used to facilitate the process and develop rapport and trust:

- Controlling the environment (Stephens, 2007). All but one of the interviews were organised in the respondents' working space (meeting rooms booked in advance) with the minimum level of noise and interruptions. The doors to the meeting rooms were always kept closed. The majority of the respondents set their mobile phones in a mute mode, although that was not the request. The interiors, familiar to the respondents made the atmosphere more relaxed and work-oriented. One interview, on the contrary, was organised in a neutral space, in a café. Although, the obtained information was very valuable, the high level of noise and periodic interruptions made it very difficult to communicate with the participant, and lately to transcribe the record (Mikecz, 2012).
- Observing respondents' body language and emotions, which is essential when discerning discomfort, confusion or interest and openness of the interviewee (Bryman, 2012). For example, during the course of one of the interviews, the researcher noticed that the participant felt some discomfort answering a question regarding inter-urban competition. This observation allowed taking control of the situation by switching off the recorder and paraphrasing the question. The interviewee was ready to share with some useful insider information but only 'off-the-record'.
- Appropriate dressing. As Mikecz (2012) observes, appropriate dressing helps the elite interviewer to 'blend in' more" (p. 488). Although New Zealand society is relatively tolerant to the personal public appearance, the researcher wore a shirt and a casual jacket for the interviews.
- Telling the researcher's life story and achievements (Stephens, 2007). Due to the fact that the researcher had extensive experience in event management, event planning and event production in Russia, it became possible to secure a kind of a 'clanship' status. This helped to break down a possible 'insider-outsider' barrier and facilitated the discussion (Shenton & Hayter, 2004). Sometimes the respondents appealed to the researcher's experience of event organisation and asked to compare for example, New Zealand and Russian contexts.

All the above-mentioned techniques proved to be very useful. They provided the researcher with an opportunity to fully control and manipulate the course and content of the interview, as well as to establish trustfulness and reliability.

3.5.2.4 Post-interview follow-up

Post-interview communication with elite respondents can be very beneficial for research and provide a researcher with additional information and feedback (Mikecz, 2012; Welch et al., 2002). The researcher found it very useful at the end of each interview to ask the respondents for an opportunity to contact them again, should any additional questions appear. All the interviewees expressed their willingness to help. On various occasions, the researcher e-mailed the participants, asking them to clarify some emerged issues or requesting some corporate documents (e.g., minutes of meetings, event programmes, and annual reports).

Some respondents requested the transcripts of interviews to check for accuracy (Welch et al., 2002). It was fruitful to use those opportunities for scheduling another short meeting with the interviewees in order to share and discuss some of the preliminary analytical findings. For example, working on the case of Wellington, a concept of 'critical mass' (Getz, 2013) emerged from the data. The researcher e-mailed the interviewees and asked them for a chance to present the concept and get their feedback. The second meeting was scheduled. The results of the second circle of interviews provided very useful data that guided the theorisation. Following each interview a 'thank you' was e-mailed to the respondents acknowledging their cooperation and contribution to the research project (Maxwell, 2012). Overall, the researcher noticed a high level of enthusiasm of the interviewees to be involved in the research. That was expressed in their prompt responses to the requests, consent to be interviewed again and willingness to be informed about the results of the research.

The researcher's experience of conducting interviews with the event planners in three cities in New Zealand supports and confirms the practicability and usefulness of the techniques of the elite interviewing described in the literature. Although some barriers might emerge while gaining access to the elite interviewees, a thoughtful and well-planned strategy, including letters requesting permission, provision of detailed information and building of trustworthiness at the earlier stages of the communication increased the willingness of the potential respondents to be involved in the research project.

An intensive pre-interview preparation played a critical role in the success of the interviewer – respondent communication. It enhanced the researcher’s knowledgeability and self-confidence, as well as built reliability and reciprocity. A clear understanding of how to behave during the course of the interview, how to control the environment and make yourself reliable maximised the positive results of interviewing. Well-designed post-interview relationships with the respondents provided the researcher with an array of additional opportunities to increase the level and value of the insights, to check the feasibility of the proposed concepts and to get thoughtful feedback.

3.6 Selecting relevant documents

Bowen (2009) notes that the analysis of documentation requires data *selection* instead of data *collection*. Administrative documents such as reports, formal studies and evaluations, letters of intent, protocols, minutes of meetings, ‘big’ documents such as city events policies and strategies were selected for this study. A list of the key documents analysed is presented in Appendix 8. The majority of documentation has been obtained from the open resources such as web-pages of city councils and relevant CCOs. Some of the documents, for example annual lists of major events approved for sponsorship, have been provided by the respondents. The researcher considers the status of the official documents as socially constructed entities with the possibility of multiple interpretations taking into consideration political and economic context in the cities at the time of their publication (Foley et al., 2008).

The data collection commenced in August 2014. All the interviews were conducted between September 2014 and January 2015. Starting from September 2014, a systematic analysis of the documentation relevant to the research was carried out. The analysis covered the entire period of data collection until January 2015. The complete time-line of the data collection is presented in the Figure 3.1.

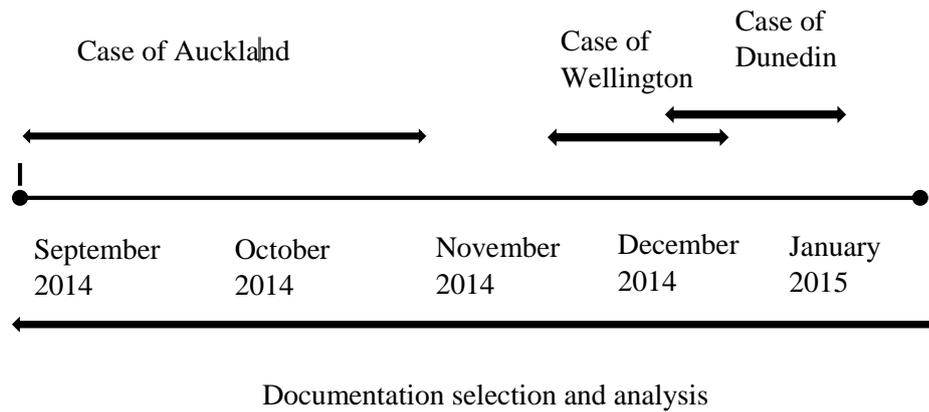


FIGURE 3. 1: TIME-LINE OF THE DATA COLLECTION

Overall, the data collection phase provided the researcher with a solid package of information and insights into the major event portfolio planning and development. The following section will outline key stages of data analysis.

3.7 Analysing the data

Supporting the assertion that it is practical to start analysing the data as it comes in (e.g., Glaser & Strauss, 1967; Morris, 2015), the coding and subsequent analysis were commenced as soon as the research began and first interviews were recorded. Early analysis gave an opportunity to refine the interview guide and focus on new aspects of the research (Morris, 2015). The researcher ran an interactive analysis where emerged codes and themes instigated the formulation of new questions for interviews, selection of new documents and analysis of literature on new topics.

As Richards and Morse (2007) note, all types of research require an abstractive way of thinking. It involves transforming data from individual instances into analytic concepts, which help to understand and explain these instances, construct transferable models and even theories. The following sub-sections describe data analysis methods and techniques applied in this research for both primary and secondary data.

3.7.1 Applying thematic data analysis

The analysis of qualitative data is always a dynamic, intuitive and creative process of reasoning, thinking and theorising (Basit, 2003). Thematic analysis is a flexible method which can summarise key features of a large body of data, generate unanticipated insights, and produce qualitative analyses (Braun & Clarke, 2006). The researcher views

this method as a pragmatist approach with the purpose of solving real-world problems and answering practical research questions (Guest, MacQueen, & Namey, 2012). From this point of view, thematic analysis can be defined as

a rigorous, yet inductive, set of procedures designed to identify and examine themes from textual data in a way that is transparent and credible... its primary concern is with presenting the stories and experiences voiced by study participants as accurately and comprehensively as possible (Guest et al., 2012, pp. 15-16).

The term ‘theme’ is understood as “an outcome of coding, categorisation and analytic reflection” (Saldaña, 2013, p. 14). It is used to describe an integrating, relational statement grounded in data that identifies both content and its meaning (Bazeley, 2013).

Thematic analysis provides an effective starting point in building a comprehensive and integrated understanding of the research findings (Bazeley, 2013). In this study, a theory-driven thematic analysis was applied. The data analysis was driven by the theoretical and analytic interest of the researcher. Codes and themes were created to answer specific research questions and meet the research objectives (Braun & Clarke, 2006). Thus, the data analysis represented not a rich description of the overall data, but a detailed analysis of particular aspects of the data. Such aspects dealt, for example, with the event portfolio design, portfolio compositional strategies, leveraging tactics, critical design factors, applied portfolio strategies and development of synergy within a portfolio. Thematic analysis enables the researcher to use both manifest- and latent-content analysis. Whereas the former can be considered as the analysis of the visible or apparent content of the text, the latter is looking at the underlying aspects of the phenomenon under investigation (Boyatzis, 1998).

Taking into account that the intention in this research was to produce a complete and generic analysis of the event portfolio design patterns, and not compare, for example, official event policy documents with the respondents’ answers, both primary (interviews) and secondary (documentation) data were analysed together using the same pool of techniques. This helped the researcher to avoid discrete comparisons between the data sets and construct themes across both types of evidence (Bowen, 2009). Such themes integrate data, collected by different methods, and provide a holistic interpretation of the research findings.

3.7.2 Stages of the data analysis

The researcher has adopted a three-phase procedure of the thematic analysis. This includes 1) Familiarising with the data; 2) Generating codes and themes; and 3) Reviewing themes. The data analysis is not a linear process of moving from one stage to another. Thus, the researcher experienced back and forth movements through the stages (Braun & Clarke, 2006).

3.7.2.1 Familiarising with the data

This stage involved interview transcribing, careful reading and re-reading of the transcriptions and collected documents, and noting of initial ideas. The researcher himself transcribed all the interviews. This allowed starting the interpretation process at the earliest phase of the analysis. Another advantage of this approach was that the researcher was able to assess his interview technique and improve it in the following interviews (Morris, 2015). The researcher then read and re-read transcripts and relevant documents in order to continue the development of initial ideas with regard to the stated research objectives. At this stage, the researcher made notes about each interview and document. Such notes reflected the value of the information, ideas for coding or identified gaps in the data. For example:

20.09.2014.

‘Scanning an event horizon’ – that might be a code that describes all the activities in Auckland to identify and develop further local events that have a potential to grow into major events. From the interview it is hard to identify any particular strategy for ‘picking the winners’. The city’s event strategy also does not contain any information on this topic. Perhaps, I need to emphasise this point and ask for the explanation.

Although this first stage of the thematic analysis was very time-consuming, it provided a solid basis for the following stage of generating codes and themes. The researcher was able to skim fluently within the collected data set and use notes to express strong interest in particular thematic areas.

3.7.2.2 Generating codes and themes

The process of coding breaks down the data into manageable fragments (Schwandt, 1997). A code can be described as a word or phrase that symbolically captures the essence of the portion of data (Saldaña, 2013). Coding, therefore, is attaching particular

labels to a particular piece of data with the purpose to go beyond the simple description of the data to its analysis and creation of thematic ideas about it (Gibbs, 2007; Urquhart, 2013). In this research, a two-cycle coding approach was utilised (Saldaña, 2013). The first cycle entailed initial coding of data, where interview transcripts and documents were broken down into discrete segments, examined and compared for similarities and differences (Strauss & Corbin, 1998). A set of descriptive and in-vivo codes was created. The example of initial coding is presented in Table 3.3.

TABLE 3.3: DATA EXTRACT WITH INITIAL CODES APPLIED

Data extracts	Coded for
<p>There are supposed to be different criteria. It is outlined in our events strategy. The difference is about economic impact, visitor numbers, those sorts of things that are measurable. However, this was our first attempt to write the strategy. It needs quite a bit of revision. We have not been able to do the revision that is needed yet. But after we have done the Cricket World Cup and FIFA U-20 that is our number one task. One of the things we will be reviewing is the differentiation between premier and major events and whether that is adequate. Many of the events that we have do not meet the benchmark that we set. We probably set those benchmarks too high.</p>	<p>Revision of the strategy</p> <p>Lack of measurement criteria</p> <p>Typology of events. Premier and major</p>
<p>Major events are recognised as a key mechanism for realising Auckland’s economic prosperity through growth in the visitor economy, regional transformation and social and cultural development legacies. More specifically, major events contribute to Auckland’s economy through the achievement of four key outcomes:</p> <ul style="list-style-type: none"> • economic growth • increased visitation • enhanced global profile • enhancing Aucklanders’ pride and making Auckland a great place to live. 	<p>Outcomes from hosting major events</p> <p>Major events as core pillars</p> <p>A great place to live – Liveability?</p>

The second cycle was represented by the development of pattern codes, which are “explanatory or inferential codes, ones that identify an emergent theme, configuration or explanation. They pull together a lot of material... into more meaningful and parsimonious units of analysis” (Miles, Huberman, & Saldaña, 2014, p. 86). During the second cycle of coding, the researcher often returned to the already coded bits of data for revision, rearrangement and reclassification. Abbott (2004) compares this practice with room decoration: “you try it, step back, move a few things, step back again, try a serious reorganisation, and so on” (p. 215). The example of pattern coding is presented in Table 3.4.

TABLE 3.4: DATA EXTRACT WITH PATTERN CODES (THEMES) APPLIED

Data extracts	Coded for
<p>This can be referred to as a portfolio approach to events. Auckland needs to take a portfolio approach to events. To invest optimally in events, Auckland needs to be clear on the outcomes the portfolio should deliver for Auckland, and how they should be measured. These outcomes should be guided by the Council’s vision for Auckland.</p> <p>Portfolio is an approach we take like a sort of any business investment. You have a portfolio of investment and you want to make sure that across this portfolio you deliver all the outcomes you are trying to achieve, recognising that each individual event does not necessarily deliver all of them. So, we have targets to achieve all our outcomes and some events more than others will do that. It is important to have... to take that...we take a portfolio approach to the events we support. There are obviously other events that happen in the city. We support events that have a potential to deliver our outcomes. And that is how they become a part of our portfolio.</p> <p>So we are completely agnostic as to the nature of the events. What we are seeking is economic growth, visitation, international exposure and properties that make Auckland the better place to live, work and play.</p>	<p>Applied portfolio approach. Orientation on outcomes</p>

The data analysis was conducted on both within-case and cross-case levels. During the within-case stage, the researcher sought for unique patterns in each case. This approach provided the researcher with the rich familiarity with the cases under study and accelerated the following cross-case analysis (Eisenhardt, 1989).

The similarities and differences in event portfolio planning and development between three cases were then mapped. This tactic allowed looking for recurring and distinctive patterns across cases and finding evidence for the emerged constructs. Huberman and Miles (1998) call this a *pattern classification strategy*. Overall, cross-case analysis “enhance the probability that the investigators will capture the novel findings which may exist in the data” (Eisenhardt, 1989, p. 541). From the within-case and cross-case analysis, more abstract and generic themes began to arise.

A memo writing was implemented during all the abovementioned coding cycles. It explored and reflected on coding process, emerged ideas, patterns and themes (Bazeley & Jackson, 2013; Saldaña, 2013). For example:

Code: Desirable city.

Reflection: This code is still under construction. It could become one of the key themes in the study. Cities want to become vibrant and attractive places to live, to work and to play in. The concept of a desirable city lead the discussion on how major events can contribute to the development of the urban areas. Need to work with the concepts of liveability and eventfulness.

The issue that arose at this stage was the reliability of constructed codes. It is widely practised in the academic world to have a second person (a peer or a supervisor) who checks the consistency and truthfulness of coding results. As the researcher used a tacit and intuitive sense to determine which text segments “look alike and feel alike” (Lincoln & Guba, 1985, p. 347), he took a position that any other person involved in coding discussion would approach the data with their own goals and perspectives. That inevitably would result in a different way of coding, segmentation and interpretation. Following Bazeley and Jackson (2013), the researcher engaged the supervisors’ team in discussion not of the codes and themes, but of the preliminary findings with the purpose to open new possibilities and enrich the interpretation of data. Coding itself was not a goal of the study; it supported the analysis and discussion. The important thing is to build a case and demonstrate how exactly conclusions have emerged from the examined data.

3.7.2.3 Reviewing themes

At the final stage of thematic analysis, the key objective was to review emerged themes and to group them in more general, and more abstract constructs that fit the research goals and explain the phenomenon under study (Richards & Morse, 2007). Reviewing of the key themes involved two levels. On the first level, the review of the coded data extracts was made in order to understand whether they form a coherent pattern (Braun & Clarke, 2006). The second level involved the evaluation of the validity and consistency of the key themes in relation to the whole data set (Braun & Clarke, 2006). At the end of this process, the researcher constructed a thematic map that emphasised the emergence of a core thematic structure of the data analysis. Following Saldaña’s (2009) and Creswell’s (2007) advice to narrow down the final number of themes to a minimum, four theoretical constructs were created: ‘Imagineering’, ‘Approaching’, ‘Composing’ and ‘Synergising’ (Table 3.5).

TABLE 3.5: A THEMATIC MAP

Construct	Themes	Sub-themes
Imagineering	Place desirability through hosting major events	<ul style="list-style-type: none"> - Constructing place identity - City eventalisation
Approaching	Institutional structures and networks	<ul style="list-style-type: none"> - Institutional arrangements - Interorganisational relationships
	Event policy frameworks	<ul style="list-style-type: none"> - Event policies and strategies - Defining and classifying major events
	Applied portfolio approaches	<ul style="list-style-type: none"> - Outcomes-driven portfolio approach in Auckland - ‘Diverse minimum’ approach in Wellington - Simplistic programming of events in Dunedin
Composing	Assembling strategies	<ul style="list-style-type: none"> - Owning of events - Sponsoring of events - Bidding for events - Creating events - Growing events
	Critical desing factors	<ul style="list-style-type: none"> - Geographical location and seasonality - Local resources - Market demand - Industry capability
Synergysing	Portfolio Integrity	<ul style="list-style-type: none"> - Portfolio balance - Event Scheduling - Leveraging of events

As Table 3.5 demonstrates, each of the emerged constructs entails one or several themes. Each of the themes also consists of several components or sub-themes which describe and explain its key aspects.

3.8 Manual and electronic technique of data analysis

Comparing manual and electronic methods of coding, Basit (2003, p. 143) concludes that “the choice between them will be dependent on the size of the project, the funds

and time available and the inclination and expertise of the researcher”. For first-time or small-scale research Saldaña (2013) recommends to start with a manual coding on hard-copy printouts because “there is something about manipulating qualitative data on paper and writing codes in pencil that give you more control over and ownership of the work” (Saldaña, 2013, p. 26). Although CAQDAS (Computer-assisted qualitative data analysis software) facilitates such activities as coding, linking between and across data segments, mapping and visualisation of the results, it is useful also to ‘touch the data’ on paper and use, for example, colour highlighter pens to mark and explore data (Gibbs, 2007). The researcher applied both techniques in order to use all the benefits of manual and electronic coding. At the first stage, the data was coded manually and the hard-copy printouts of code lists were produced. The researcher extensively made notes and comments in margin text boxes of the printed documents and interview transcriptions. At the second stage, the results of the manual coding were transferred to and stored in NVivo10. This software allowed constructing a variety of hierarchies of codes, reconfiguring and analysing the relationships between emerged themes and creating and working with different analytical models, tree maps and charts.

3.9 Applying interpretation strategy

Interpretation implicates understanding and meaning making of the analysed set of data. As Mills (2007) claims, “analysis involves summarising what is in the data, whereas interpretation involves making sense of – finding meaning in – that data” (p. 122). To put it simply, while interpreting transcribed interviews and official documents regarding the planning and development of events in the selected cities, the researcher attempted to explain the meaning of the participants’ words, their actions and intentions stated in public documents. The researcher was involved in unique and contextualised knowledge construction, which is beyond simple description of the phenomenon under study (Trent & Cho, 2014). The goal was to present an ‘authentic’ understanding of the phenomenon, where data was interpreted against the background of the social and temporal contexts in which they were produced and collected (Ghauri, 2004; Hammersley & Atkinson, 2007). The data was interpreted inductively. The meanings were constructed in order to build abstractions where “many disparate pieces of collected evidence are interconnected” (Bogdan & Biklen, 2003, p. 6). The results of the data interpretation were presented by way of theoretical assertions. Assertions are declarative statements which include a summary of a new understanding and are supported by analysed data

(Erickson, 1986; Trent & Cho, 2014). Assertions as all knowledge constructed by pragmatists are always open to revision when new evidence or contradictions appear.

In this thesis, Chapter 4 and Chapter 5 entailed the analysis of the collected data, whereas Chapter 6 focused on a more abstractive theorising on the portfolio design issues. A theoretical model of event portfolio design in New Zealand was discussed. The researcher followed Mills's (2007) suggestion to contextualise the research findings with literature in order to compare interpretations with existed literature. This strategy helped to highlight the unique contribution of this study to the understanding of the event portfolio phenomenon and its role in city development strategies in New Zealand. In constructing the interpretive framework, the researcher tried to increase the level of abstraction and link it to the broader contemporary issues in event studies and other relevant fields.

3.10 Research validation strategies

Qualitative research is often criticised for the lack of replicability, generalisability and transparency (Bryman, 2012). Although it is unlikely to expect that a qualitative research can be replicated or the results can be generalised (data is always context-dependent), a clear validation of the research design and findings is required. In this research, validation is considered as “an attempt to assess the ‘accuracy’ of the findings, as best described by the researcher and the participants” (Creswell, 2013, p. 249). To ensure the truthfulness of the conducted study, the researcher applied a set of validation strategies on ontological, epistemological and methodological levels.

Firstly, the critical realist perspective of the research calls for understanding, rather than validity. Understanding is “the power to make experience intelligible by applying concepts and categories” (Wolcott, 1990, p. 146). The aim of the research was formulated as a ‘how’ inquiry and intended to understand how cities in New Zealand plan and develop their portfolios of major events. The ‘how’ questioning allows discovering knowledge of the real world “by naming and describing broad, generative mechanisms that operate in the world” (Healy & Perry, 2000, p. 123).

Secondly, from the epistemological perspective, the credibility of the research was achieved by using cross-case comparisons and linking the obtained results to the literature (Eisenhardt, 1989). Codes and themes emerged from the analysis were continuously compared and checked. This allowed establishing of causal relationships

between identified patterns (Yin, 2014). In addition, the analysis and interpretation of the research results were contextualised within the research cases. A rich description of the cases under study allows readers to make decisions regarding possibilities of transferability of the research design and techniques into different settings (Creswell, 2013; Lincoln & Guba, 1985).

Finally, methodological truthfulness was achieved firstly, by conducting a cross-case analysis. This approach allowed an in-depth investigation and comparison of emerged findings. Secondly, the reporting of relevant quotations that back up the data analysis was implemented in order to increase the truthfulness and reliability of the study (Healy & Perry, 2000). Thirdly, audio recordings and electronic copies were maintained in order to verify the analytic procedures run by the researcher. Finally, a detailed description and explanation of case selection, sampling, data collection and analysis techniques provided a solid basis for truthfulness, reliability and confirmability (Lincoln & Guba, 1985).

3.11 Ethical Consideration

Since this research involved humans as participants, the development of an ethical research process was important. In line with the principles of Auckland University of Technology's Ethic Committee (AUTEK) a variety of ethical principles was integrated into the research, including informed and voluntary consent, respect for rights of privacy and confidentiality, truthfulness, including limitation of deception. All the interviewees were informed about the research, its goals and objectives. The researcher provided them with all necessary documents and forms prior to the data collection (Appendices 2 and 3).

The research design and process incorporated all three core principles of the Treaty of Waitangi, which are partnership, participation and protection (Hudson & Russell, 2008). The participants were treated as valuable contributors to the knowledge creation. This study was considered as a mutual activity which involved co-ownership and shared power with respect both to the process and to the results of the research (Smyth, 2004). The informants were updated regarding the progress of the research. The researcher sought feedback from them to gain additional value from the perspective of practitioners involved in city event programming. The researcher respected the privacy and autonomy of the participants and guaranteed their confidentiality. Each participant received an individual code that consisted of a capital letter and a number, for example, A1, W1,

D1. Capital letters were used in accordance with the city, the research was conducted in: A for Auckland, W for Wellington and D for Dunedin. The issued numbers were given in accordance with the order the participants were interviewed. This approach ensures that the confidentiality of the respondents is secured at any stage of the research. However, each of the participants was informed that responses might be attributable to individual interviewees because of the small pool of experts relevant to this study. Therefore, they could be identified in connection with the area of business and the nature of their role. The formal ethic application 14\213 was approved by AUTEK on 15 August 2014.

3.12 Summary of the chapter

This chapter provided an extensive overview of the research design and applied methods. The discussion and justification of the ontological critical realism, pragmatist epistemology and multiple case-study methodology were presented. The chapter then detailed the procedure of case selection. The chapter continued with the analysis of the relevant sources of evidence. Semi-structured interviews and documentation were discussed. The strategies of data collection, including interviewing and document selection, were analysed. After that, the chapter focused on data analysis techniques. Key aspects of thematic analysis were outlined. The principles of the applied interpretation strategy were presented. The chapter concluded with the discussion of validation techniques and ethical considerations. The next chapter focuses on the case-oriented analysis of the contextual environment in the cities under study. It explores data with regard to institutional arrangements and event policy frameworks and their influence on the development of portfolio approaches to major events in Auckland, Wellington and Dunedin.

Chapter 4: Developing a portfolio approach to major events

4.1 Introduction

The analysis part of the thesis consists of two chapters. Chapter 4 presents the research findings, which focus on the development and implementation of portfolio approaches to major events in Auckland, Wellington and Dunedin. Chapter 5 analyses key aspects of portfolio programming in the cities.

The overall purpose of this chapter is to analyse the inter-relations between institutional arrangements, event policy frameworks and applied portfolio approaches or strategic ways of major events programming. The chapter aims to address the first objective of the research, which is to explore the influence of the public sector institutional and policy environments on the realisation of portfolio approaches.

Thematic analysis of interviews and relevant documents revealed an interplay of three themes that explain the relationships between local contexts and applied portfolio approaches. The first theme, 'Institutional structures and networks', describes the current relationships in the public sector. Key arrangements that affect planning and development of major events are analysed. The second theme, 'Event policy frameworks', outlines the public policy aspects of major events programming in the cities under study. The third theme, 'Applied portfolio approaches', explores the relatively different strategic initiatives in the cities, which incorporate diverse financial, planning and managerial aspects of event portfolio development.

The difference in public environments, explored in this chapter, serves as a contextual background for the analysis in Chapter 5, which focuses on cross-cutting themes regarding key aspects of portfolio design in Auckland, Wellington and Dunedin. Throughout the chapter, quotes from interviews and public documents are included to illustrate and support the analysis. Following the ethical considerations, discussed in Chapter 3 (Section 3.10), each interviewee has a personal code (e.g., A1, W1, D1), which is used to identify the authorship of interview quotations.

4.2 Emerged theme: Institutional structures and networks

This section introduces the first theme, ‘Institutional structures and networks’. It covers and explores distinctive public sector arrangements and inter-organisational networks in the cities under study. Transcripts of semi-structured interviews and relevant public documents revealed two sub-themes: ‘Institutional arrangements’ and ‘Inter-organisational relationships’.

4.2.1 Sub-theme: Institutional arrangements

The key institutional arrangements that affected the realisation of major event strategies in Auckland, Wellington and Dunedin related to the establishment of local city economic development agencies: Auckland Tourism, Events and Economic Development (ATEED) in 2010, Wellington Regional Economic Development Agency (WREDA) in 2014 and Enterprise Dunedin in 2014. The creation of these new Council-controlled organisations (CCO) resulted in amalgamation and integration of previously discrete destination management activities, including economic development, industry and business growth, investment attraction, tourism and major events.

As was reflected in relevant official statements and public documents (Auckland Tourism Events and Economic Development, 2014b; *Enterprise Dunedin taking shape*, n.d; WREDA, 2015), the overall rationale behind such changes in the institutional structures of the cities related to the tendency to central decision-making in all critical spheres of sustainable destination development. A more coordinated approach to economic growth, tourism and major events decreased the levels of agency costs and duplication of efforts, and it guaranteed the realisation of region-wide, coordinated strategies in line with broader economic development objectives. While the CCO status obliged such organisations to operate at ‘arm’s length’ (A1) and be accountable to City Councils, it provided some strategic benefits. For example, in Auckland, interviewee A1 argued that being ‘one step away’ allowed ATEED to operate more commercially. In 2012-2013, major events generated NZ\$39.1 million of RRI (Return on Regional Investment) and 290,000 visitor nights (Auckland Tourism Events and Economic Development, 2013a). The 2013-2014 financial year resulted in NZ\$46.3 million of RRI and 298,000 visitor nights (Auckland Tourism Events and Economic Development, 2014a). In 2014-2015, ATEED invested NZ\$14 million into major events. The investment returned NZ\$85 million with 426,500 visitor nights (*Top results for Auckland’s non-stop 2014/15 year of events*, 2015).

The formation of new economic development agencies changed the way major events were planned and managed in the cities. In Auckland, a separate management scheme was applied. Major events became a part of ATEED's portfolio of activities, while smaller local and regional events remained under the jurisdiction of Auckland Council (AC). ATEED became responsible for major event development, major event delivery and operational facilitation, major event investment and major event industry capability development (Auckland Tourism Events and Economic Development, 2013b).

The arrangements in Wellington represented a transformative stage of major events management. Although one of the key tasks of the newly established WREDA was to manage portfolios of major events, the relocation of duties between Wellington City Council (WCC), which previously planned all the events (local and major), and WREDA was still in process. Interviewees A2 and W1 argued that the key benefits of major events relocation to the relevant CCOs was their integration with other critical areas of destination management. Economic development agencies played a role of a 'one-stop shop' (W2) for major events, which facilitates the implementation of events into a wider city development agenda.

In Dunedin, a merged type of public event management was applied. Dunedin City Council (DCC) delivered all public events, including major events. Although Enterprise Dunedin was responsible for bidding for major events, the agency was not involved in major events management directly.

Overall, the creation of regional economic development agencies was a trend in the studied cities. The described organisations were expected to provide the cities with a solid asset in terms of consolidation, manipulation and negotiation within critical areas of city development, including economy, investments, tourism and events. At the time when the research was conducted, WREDA and Enterprise Dunedin had just commenced their activity, and it was impossible to track any significant achievements of these agencies. In comparison, ATEED was the oldest and more experienced organisation, and its successful intervention in major events may be expected to serve as a guiding example for other cities in an attempt to capitalise on their potential and maximise the return on investment from staging major events.

4.2.2 Sub-theme: Inter-organisational relationships

The appearance of new players in the institutional arena of the cities led to the formation of new or re-formation of previous relationships between key stakeholders. Well-developed relationships among different stakeholders were considered by the interviewees as one of the critical elements of a successful implementation of major event strategies in Auckland, Wellington and Dunedin. Although the discussion of stakeholder relationships was not a primary objective of the research, it seemed necessary to present some key points that emerged from the data analysis. The data emphasised at least two types of stakeholders operating in the cities: strategic and operational stakeholders.

4.2.2.1 Strategic stakeholders

A group of strategic stakeholders includes different agencies from national and city levels that have the authority to influence decision-making regarding hosting and funding major events in the cities. Apart from the economic development agencies (ATEED, WREDA, Enterprise Dunedin), this group includes city councils, Tourism New Zealand and Sport New Zealand, which are two national destination management and sporting organisations, and New Zealand Major Events, a central government division responsible for supporting major events of national importance.

Taking into account the fact that city event teams in Auckland, Wellington and Dunedin are either incorporated into the Council's structure (Dunedin) or belong to relevant CCOs (Auckland and Wellington), the relationships between the Councils and major event planners in general were characterised by the interviewees as constructive. In Auckland, appropriate policies, protocols or statements of intent regulate the relationships between AC and ATEED:

When it comes to work with Auckland Council we actually have quite a strong connection with Council, obviously because we are a council controlled organisation. Our entire statement of intent is based on what the Council asks us to achieve (A2).

Interviewee A4, however, mentioned that the communication between ATEED and AC was not great all the time. Although they were improving and getting better, "it is still bit of a case of them and us" (A4). The explanation was in the level of responsibilities and decision-making that were taken from the Council and passed on to ATEED. Some Council departments were not prepared to share or relocate authority to a new agency.

In Wellington, the head of the WCC events team met the City's mayor regularly to report current event-related initiatives and discuss any emerged strategic issues. WCC, as a stakeholder, controlled the regulations around staging and supporting major events. The establishment of WREDA as a key major events player in the city re-structured and redefined the allocation of responsibilities with regard to major events programming. However, at the time when the data was collected, the relationships between WCC and WREDA were at their immature stage without clear established structure and regulations.

In Dunedin, the merged management of events within DCC predefined a leading role of the Council in planning and development major events strategies. As indicated in the previous sub-section, Enterprise Dunedin was not involved in major events management. The relationships between DCC and Enterprise Dunedin were also at an immature, introductory stage without clear distribution of responsibilities in the major events sphere.

The prevailing data regarding the necessity of well-developed relationships between city event planners and national strategic stakeholders came from the case of Auckland. The city was actively involved in different national and international bidding projects in cooperation with Tourism New Zealand, Sport New Zealand and Major Events New Zealand. ATEED usually played the role of a key negotiator with these national organisations. The data demonstrated that the relationships between the city event planners and key national partners had been evolutionally developed since the establishment of ATEED in 2010. The concentration of all event-related strategic activities within one organisation made it possible to build a constructive collaboration between the city and national stakeholders. Interviewee A2 argued that both ATEED and national government agencies had a clear understanding of each other's plans and expectations:

One of the great things around the relationships we have with NZ Major Events and Sport New Zealand is that now we really understand what they are looking for from events, they really understand what we are looking for from events. We work incredibly collaboratively... We have got very open relationships with each other. That is a quite open discussion. There is not often disagreements because we really understand each other's outcomes (A2).

New Zealand Major Events possessed the authority to manipulate and even refuse to support some Auckland major events projects. The example is the NRL Auckland Nines, a weekend-long rugby tournament. In 2014, New Zealand Major Events declined the

City's application for sponsorship, arguing that the financial support of this particular event may have negative impacts on another rugby-themed event, hosted in Wellington. However, interviewee A4 clearly emphasised the existence of a constructive workable environment between ATEED and other strategic partners:

Because for some events if you do not get the central government funding that event opportunity may not go ahead because of insufficient funding. There can be an influence. The ideal is that you want your strategies to align with each other. Obviously, they all are going to have their own strategies but there are areas where you want overlap, so you can work together to achieve similar outcomes (A4).

Interviewee A2 mentioned that in the case of some major events, for example the 2008 FIFA Women's U-17 World Cup, where the benefits for the whole country were seen as far greater than for an individual city, the city event's team was able to "push back to central government" in order to negotiate the split of financial support for the event. Another example of a collaborative relationship between Auckland event planners and national institutions, in particular, Sport New Zealand, is the World Masters Games, an event to be held in Auckland in 2017. From a very early stage, the stakeholders worked in partnership, identifying event-related opportunities and expected outcomes.

Event planners from Wellington and Dunedin also emphasised the critical role of the strategic stakeholders in the major event sector. However, the active phase of the relationship usually occurred during the national bidding projects where these cities participated. The interviewees from Wellington expected WREDA to become a key negotiator with the national strategic stakeholders. A more ad-hoc approach prevailed in Dunedin. For example, commenting on the current event promotion campaigns in the city, interviewee D4 noted that the city relied completely on Tourism New Zealand and their mass-media projects. This demonstrated a passive role of the city event planners in establishing strategic relationships with national organisations.

4.2.2.2 Operational stakeholders

The members of the operational stakeholder group in the cities under study varied. In general, the group includes all the organisations which were directly or indirectly involved in planning and hosting events. Auckland, for example, established a 'Number Eight Group' that included Auckland Transport, Waterfront Auckland, Auckland Regional Facilities, Auckland Police and some other relevant AC departments. The group met quarterly and discussed current issues with events in the city, common objectives and

operational plans. The relationships between these stakeholders were regulated by a specific protocol that acknowledged distinct objectives of the stakeholders and encouraged them to cooperate in order to facilitate the realisation of the events strategies in the city.

In Wellington, key operational stakeholders, including Wellington Tourism, Wellington Venues and Grow Wellington were amalgamated into WREDA. As interviewees W1 and W2 argued, that arrangement would facilitate the cooperation between the teams. Considering the city retail and hospitality industry as one of the critical event stakeholders, city event planners organised meetings with the representatives of these areas of business on a monthly basis. The key purpose of such meetings was to

Get together to talk about the city's plans for events. They are very interested. Additionally, we have done the same for Christmas, we have spoken to them, what do you want to see, what is important to you. So, this group represent a wider sector. It is a really good form to get a feedback from the industry (W2).

In Dunedin, a city coordination group of the key stakeholders included representatives of the Police, Otago University, schools and city retail:

The city is small enough to engage the whole city, the schools get involved, and the university gets involved. Come to Dunedin with your event and the entire city will get behind you because we have the mechanisms to do that. Rugby World Cup for example. There was a city coordination group. We get together every couple of months to ensure that any big events in the city are run smoothly. There will be someone from the Police, from the University (student association), from the retail (D2).

The relationships between operational stakeholders sometimes appeared to be uncoordinated. For example, in Wellington, a lack of coordination and planning between two separate council groups responsible for event planning and urban design resulted in a series of lost opportunities. Interviewee W2 mentioned a situation when a new event space was created and approved by WCC without any consultation with the WCC event facilitating team:

While we are so limited for venues in Wellington we can work with other council's teams. If we have got an urban design team who have a big part of money to develop new spaces around Wellington we are just not getting in there early enough to talk to them on how to develop it to be an amazing space for a really big event. We could go last minute and say, ok make sure you have

got power provision and good lighting. It is very reactive. We need to plan purposefully with that unit on how we can plan (W2).

Overall, the relationships among city event planners and other strategic and operational stakeholders played a critical role in planning and delivering major events in the cities under study. The ability to coordinate stakeholders through the implementation of different tactics (e.g., protocols and group meetings) gave event planners an opportunity to purposefully talk to the interested event-related agents and direct joint efforts to the realisation of major event projects.

4.3 Emerged theme: Event policy frameworks

This section focuses on the analysis of the established event policy frameworks in Auckland, Wellington and Dunedin. The theme ‘Event policy frameworks’ is broken down into two sub-themes: ‘Event policies and strategies’ and ‘Defining and classifying major events’. The first sub-theme examines the formulation and realisation of city event policies and strategies. The second sub-theme explores how city events planners and public documents define and classify major events.

4.3.1 Sub-theme: Event policies and strategies

The data analysis indicated that the cities under study operated with relatively distinct bodies of official strategies and policies. In Auckland, a cluster of regulations included well-developed documents that regulated all the main dimensions of event programming. The summary of implemented policies and strategies is presented in Table 4.1.

TABLE 4. 1: AUCKLAND EVENT POLICY FRAMEWORK

Year	Name of the document	Description
2011	Auckland Major Events Strategy (AMES)	A framework for planning and development of major events. Presents a detailed typology of major events, their roles and main city’s objectives with regard to hosting major events. A portfolio approach is presented and discussed. Key outcomes and measurement criteria are outlined.
2013	Auckland’s Major Events Protocol (AMEP)	A guide for the key event stakeholders in the city and for a wider events industry on how the process of major events selection and support is organised. Roles and responsibilities of key actors are explained.
2013	Auckland Events Policy (AEP)	The overarching strategic document that explains the rationale for events

		<p>planning\hosting\development and justifies the involvement of AC in these activities. It explains key principles for delivering events, funding criteria and strategic objectives. Roles and responsibilities of local and regional boards, governing body and ATEED are detailed.</p>
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In 2010, ATEED announced the development of the Auckland Major Events Strategy (AMES). Created within a ‘Mayor’s 100 projects’ (Auckland Council, 2010), it paved the way to the strategic use of major events in the city. AMES emphasised that major events can play a key role in helping cities to achieve their long-term economic and social goals. Events can deliver immediate economic benefits, impact on a city image, make cities more vibrant and interesting places to live and be a catalyst for change and further development (Auckland Tourism Events and Economic Development, 2011). The development of the strategy was a well-timed decision for the city that had lost several important events, turned down a free waterfront stadium and, in spite of this, envisioned itself as the best events destination and the most liveable city in the world. The strategy was of an expansionary nature, concentrating on buying, bidding, and growing major events that could bring significant economic return to Auckland and enhance its brand.

In addition to AMES, an Auckland Major Events Protocol (AMEP) was announced in 2013. The key objective of AMEP was to create an event-friendly culture within AC, relevant CCOs and the wider event industry. The protocol regulated the relationships between key event stakeholders in the city, and clarified the operational procedures that drive major event selection and funding. Such processes as allocation of major events funds, event development, event operations, and event debrief and event facilitation were explained in detail. AMEP represented a clear guide and message to the event industry on decision-making criteria, timeframes and efficient customer-driven service.

In 2013, AC released an official Auckland Events Policy (AEP). The document articulated how and why the Council was involved in events, what it aimed to achieve, the various roles the Council would play and the context within which decisions for events in the city would occur. AEP suggested a general framework that embedded city events into a wider context and strategically aligned them with Auckland’s Unitary Plan and other strategies, programmes and plans (e.g., Economic Development Strategy, Arts and Culture Strategic Action Plan, Integrated Transport Programme, Sport and Recreation

Strategic Action Plan). The policy became a valuable guide for city authorities, covering all important areas of event-related activities.

Overall, Auckland produced a solid regulatory foundation for the realisation of a strategic approach to major events. Event policies and strategies guided this process, emphasising such aspects as delimitation of authority, distribution of funding and establishment of precise targets and outcomes in the major event sphere.

In contrast to Auckland, in Wellington and Dunedin event policy frameworks were less developed. In Wellington the first city event strategy was released in 2003 (Wellington City Council, 2003). One of the goals of the strategy was to develop a strong event support infrastructure. Thus, a single co-ordinating unit for events development in the city was established within the Council. The team produced a set of 'how to' event guides including information and advice on regulatory compliance, protocols and risk management. The strategy also coordinated the relationships between key tourism and event-related agencies in Wellington, including the City Council itself, events unit and Positively Wellington Tourism. Overall, the document was a good starting point for the development of a united official vision on events, their organisation and possible outcomes for the city.

The strategy was succeeded by the Wellington Event Policy (WEP) in 2012. It was developed within a general city development framework 'Wellington 2040 – Smart Capital'. WEP emphasised the role of major events as a key economic contributor. They attract visitors, provide jobs and help to position the city as an attractive destination. WEP identified a set of critical directions for the industry, including the development of new major events, sustainable development, strengthening of current partnerships, city profiling and construction of a balanced and diverse calendar of events (Wellington City Council, 2012). The WCC's role was formulated in facilitating, partnering and advocating the event-related strategic initiatives in the city. With the establishment of WREDA, city event planners expected some changes in the current event policy, in particular with regard to event classification matrices and spheres of responsibility between the new entity and WCC events' team.

The first and the only, to date, experience of strategy making in Dunedin dated back to 2009, when a Dunedin Festivals and Events Strategy (DFES) was released. DFES outlined the general idea that events and festivals play an important role in the city development. The key purpose of this strategy was to fill the gaps in the city attitude to

public events, their funding and development. Before the release of the strategy, the decisions on the number of supported events and their genres were made during the annual planning meetings in DCC without any evaluation, market research and strategic guidelines. Although the strategy was supposed to play a fundamental role in Dunedin's public event sector, the researcher was surprised to find out that only one out of five managers, who closely worked with event planning and promotion in Dunedin, were aware of the existence of DFES. The stated targets and measures of success did not reflect the real situation in the industry, and the strategy required revision and adjustment with other city development policies. The expectation was that the current DFES would be refreshed and transformed into a specific plan that would fit the economic development strategy.

4.3.2 Sub-theme: Defining and classifying major events

The event planners in Auckland, Wellington and Dunedin operated with several definitional matrices that differentiated events by their size, scale and objectives. In general, the classification of events in the three cities included local or community events, regional events and major events. The description of major events in the cities correlated with the characteristics formulated by the national government. Thus, the National Major Events Strategy (NMES) defined major events as events that should generate significant economic, social and cultural benefits to New Zealand; attract international participants and spectators; have a national profile outside of the host region; and generate significant international media coverage (Ministry of Business Innovation and Employment of New Zealand, 2010). Consequently, in Auckland, major events were defined as events of national or international interest (ATEED, 2011). They were pivotal to the city's brand and could deliver significant economic and/or social outcomes. Major events were seen as 'core pillars' (Auckland Tourism Events and Economic Development, 2011) of the visitor economy. Some major recurrent events achieved the status of anchor events. These are events that

Have to be sustainable and annual. They need to be regular. An anchor has to be something growing and developing, one of the key events. We want such events be somehow distinctively Auckland, fit the brand of the city (A3).

Anchor events should meet at least three criteria. They should be regular events with mass appeal, which are consistent with the city's brand or inform the brand. Social anchors must attract at least 200,000 participants or spectators. The purpose of social

anchors was to make Auckland a more attractive place to live in. The current examples in the city are the Pasifika Festival and the Lantern Festival, two large cultural celebrations of ethnicity, traditions, music and food. The Pasifika Festival is an annual Pacific Islands-themed event and is the largest festival of its type in the world. The festival presents a wide variety of authentic experiences, including traditional cuisine, performance and crafts from the Cook Islands, Samoa, Fiji, Tonga, Maori and other Pacific ethnicities. Annually the event attracts over 200,000 visitors. The Auckland Lantern Festival is organised by ATEED in partnership with Asia New Zealand Foundation. The festival is one of the biggest and most popular cultural events in Auckland. The event celebrates the city's vibrant ethnic diversity and marks the end of Chinese New Year festivities.

Economic anchor events must generate an immediate Return on Regional Investment (RORI) of at least NZ\$5 million. An example is the Dick Smith NRL Auckland Nines that is hosted annually in Auckland with 16 competing teams from Australia and New Zealand. A two-day knock-out rugby tournament, it also includes fans festivals, thematic exhibitions and live music. In 2014, the event delivered NZ\$9.35 million to the city.

In Wellington, city event planners operated interchangeably with two notions: iconic and major events: "We say iconic, but I think our terminology now is major" (W2). Iconic became a qualitative and image characteristic of a major event. Interviewee W1 argued, "For us iconic is not only major in terms of size and scale, but I think iconic is being synonymous of Wellington. Those events are unique to Wellington". The attributes of the Wellingtonian iconic events and anchor events in Auckland are quite similar and possess the same characteristics of uniqueness and embeddedness. For example, the World of WearableArt Show is an annual presentation of art, music, dance, drama and comedy. The show highlights the Wellington entertainment scene, fashion and creativity. Over 300 designers from New Zealand and overseas participate every year in this celebrations. In 2014, a themed travelling exhibition was created to highlight 32 award-winning garments from the past shows.

The New Zealand Festival is a biannual cultural event, hosted in Wellington. It brings the best live arts world experience to New Zealand, and is a leading multi-arts festival in Australasia. The festival includes over 300 large and small events and features more than 1000 national and international artists and writers. Cuba Dupa is a new street festival in

Wellington that highlights and celebrates the creative spirit of Cuba Street and the Wellington community. Cuba Street is an iconic creative district in the city. During the events, several streets in the city centre are closed for live music and dance performances.

In Dunedin, the category of major events was represented by two types. These were major events and premier events. Major events “attract a substantial audience and participation and contribute to the positive regional and sometimes national profile of the city.” (Dunedin City Council, 2009, p. 6). Such events should attract at least 5,000 people, including a reasonable number of visitors. Premier events “attract a large audience and participation, generate significant economic wealth, and contribute to the positive national and international profile of the city” (Dunedin City Council, 2009, p. 6). Premier events should generate NZ\$1.0 million and attract at least 5,000 visitor nights. The comparison of these types demonstrates that the key difference between major and premier events lies in their ability to attract visitor nights and generate significant economic and media outcomes. In reality, it is not so obvious. The event planners in Dunedin found it hard to manage and categorise available major events using the suggested matrix of measurable indicators (e.g., economic impact, visitor numbers). Many events that were labelled as ‘premier’ did not meet the expected requirements. Similar to anchor and iconic events, premier events also possessed a characteristic of uniqueness. Such events ‘tell a story of the city’ (D4). ID Dunedin Fashion Week, one of the leading national fashion events in New Zealand, for example, emphasises and celebrates the city’s history of fashion and design, as well as its creativity and unique style. In 2014, the event celebrated its 15th anniversary. The events during the fashion week included retail exhibitions, workshops and demonstrations. The week culminated the ID International Emerging Designer Awards and the ID Dunedin Fashion Shows. The Dunedin Midwinter Carnival is organised by Dunedin Midwinter Celebrations, a charitable trust based in the city. The event celebrates the winter experience in the city, and the key theme of the Carnival is the longest night in the year. Each year the Carnival attracts talented local artists and the wider regional community.

To sum up the analysis, the theme ‘Event policy frameworks’ identified and explored distinct levels of public policy development in the cities. Auckland was notable for its detailed elaboration of all relevant aspects of event planning, management and evaluation. Indeed, each of the discussed policies and strategies covered and justified events as a key pillar of city development and public good. They also provided a guideline for all the relevant stakeholders on how to proceed and what to expect while programming major

events in the city. Wellington and Dunedin operated within less detailed frameworks, where major events were also justified, but the tactics and instruments of their planning and development were not clearly specified.

4.4 Emerged theme: Applied portfolio approaches

This section presents the analysis of one of the key emerged themes ‘Applied portfolio approaches’. It describes the development of the strategic portfolio approaches to major events in Auckland, Wellington and Dunedin. In contrast to previously explored themes in this chapter, which were broken down into sub-themes to facilitate the analysis, the current theme entailed three different strategies. As Table 4.2 demonstrates, each of the studied cases applied a distinct approach and incorporated diverse financial, planning and managerial strategies that result in the formation of different portfolios.

TABLE 4. 2: PORTFOLIO APPROACHES TO MAJOR EVENTS IN AUCKLAND, WELLINGTON AND DUNEDIN

City	Strategic approach	Key features
Auckland	Outcomes-driven portfolio approach	<ul style="list-style-type: none"> - Portfolio as a set of investment - Orientation on stated outcomes; - Agnostic attitude to the compositional structure of the portfolio; - Event programming on the basis of audience motivators and audience directionality: - Aggressive bidding campaign.
Wellington	‘Diverse minimum’ approach	<ul style="list-style-type: none"> - Portfolio as a composition of events - Limited funding\investment - Portfolio capacity: <ul style="list-style-type: none"> • Content-rich saturation • Full utilisation of event-related resources - Adding new elements to already existing events
Dunedin	Simplistic programming of events	<ul style="list-style-type: none"> - Portfolio as a list of events - Hereditary composition of the portfolio - ‘Free for all’ style of programming - Room for innovation and community creativity

The section consists of three parts. Firstly, Auckland’s outcomes-driven portfolio approach is presented and analysed. The focus of the second sub-section is a ‘diverse minimum’ approach in Wellington. Finally, a simplistic programming of events employed in Dunedin is examined.

4.4.1 Strategy 1: Outcomes-driven portfolio approach in Auckland

The roots of the outcomes-driven portfolio approach to major events in Auckland lie in the established event-related institutional structure and event policy framework in the city. Indeed, the concentration of decision-making within one agency, ATEED, as well as the development of a pool of event policies and strategies, determined a pure investment and outcomes-oriented nature of the city's portfolio of major events.

The portfolio consisted of events that were chosen within a given financial year to achieve outcomes stated in AMES and guarantee ROI. The list of events included into the 2014-2015 portfolio is presented in Appendix 5. The rationale behind portfolio creation was to establish a balance between productive and consumptive outcomes delivered by events and develop a clear vision on the outcomes the whole programme of events should achieve (Auckland Tourism Events and Economic Development, 2011). The portfolio-related objectives may vary due to the current vision and targets of the city. For example, a set of the city's strategies and policies, including events, was clustered around the construction of Auckland's image as the world's most liveable city. This presupposed and signified the achievement of ongoing city prosperity, the growth of the visitor economy, the enhancement of the city's status as a major event and tourist destination, as well as the development of a creative, vibrant international city. The event portfolio was viewed as an investment portfolio, the value of which was estimated on the basis of the sum total of the events included into this portfolio:

Portfolio is an approach we take like a sort of any business investment. You have a portfolio of investment and you want to make sure that across this portfolio you deliver all the outcomes you are trying to achieve (A3).

This approach suggested a more strategic vision on events in the city, "ticking all the boxes" at the programme level, rather than requiring each event to "tick all the boxes" on a stand-alone basis" (Auckland Tourism Events and Economic Development, 2011, p. 14). Such an approach corresponded to the national major event strategy, where an overall balance of the suggested major events' criteria should be planned and measured at the national portfolio level, and not for separate events which are planned to be staged in New Zealand (Ministry of Economic Development of New Zealand, 2007). The event planners from ATEED made a clear distinction between a portfolio of major events and a programme or calendar of other local and regional events, which were planned and managed by local authorities and AC's events team:

Calendar is all of the events that are held in Auckland, in which ATEED may or may not have an involvement with. The portfolio of events is those events that we work with to achieve specific outcomes under the major events strategy (A2).

Each year ATEED received funding from AC to support the realisation of AMES in the city and create a portfolio of major events. The budget for the 2014/2015 year was NZ\$12.4 million.

The review of the stated outcomes clearly demonstrated the dominance of the economic growth paradigm. Major events were recognised as key providers of substantial economic benefits to the city. This included the injection of new money into the economy, increased visitation and global profile that, in turn, brings new investment and skilled migrants. The only socially-oriented outcome to “make Auckland a great place to live” (Auckland Tourism Events and Economic Development, 2013b, p. 6) was less tangible and less clear. According to interviewees A1, A2 and A3, they were still in process of developing clear measures of success of this outcome. The currently applied parameters, such as number of event attendees and the level of audience satisfaction, did not provide the city event planners with a real picture of the event results with regard to the development of a liveability factor. The outcomes-driven approach determined the selection of events for the portfolio:

You have a portfolio of investment and you want to make sure that across this portfolio you deliver all the outcomes you are trying to achieve, recognising that each individual event not necessarily delivers all of them. So, we have targets to achieve, and some events more than others will do that. It is important to take a portfolio approach to the events we support (A3).

Such an ‘agnostic’ attitude diminishes the importance of the portfolio’s genre structure: “We are completely agnostic to the nature of events” (A1). In reality, Auckland’s portfolio represents a mix of cultural and sporting events. However, the design principles do not emphasise the genre balance as a critical component of major events programming.

The ‘agnostic’ vision on portfolio structure advocated a different rationale for major event programming. According to interviewee A2, a conventional split of events on sporting and non-sporting has some limitations, for example, in terms of unclear motivational factors that determine the level of popularity of an event. Hence, events that compose a portfolio should be analysed in terms of audience motivators (e.g., to celebrate, to participate, to support), community groups’ directionality (e.g., family, youth,

subcultures) and a diversity of events elements that contribute to the compositional balance in the portfolio (e.g., cultural festivities within a sporting event, sporting competitions during a cultural festival). Interviewee A2 argued:

It depends how you look at things. You can look at things in terms of sport versus non-sport, or you can look at things in terms of motivators, family events or events that have cultural element to them or events that generate a large crowd. Maybe it is the buzz of a large crowd that you really like. In this case, you might be as excited to go to the Rugby Nines as you would be to go to the Pasifika. It's almost your motivator to attend. It is not because it is sport or non-sport. That might not be the best way for us to split events. It could be the best way for us to split events is to think about what motivates people to attend something. It might be completely irrelevant what the content is or atmosphere (A2).

The incorporation of some cultural, music or heritage elements that accompany, for example, the main sporting event may provide an array of opportunities for locals, visitors and participants to affirm and celebrate their shared identity and enhance the value of the main event. As an example of such a strategy, it is possible to mention the 2015 Dick Smith NRL Auckland Nines, a relatively new but very successful economic anchor event in the city. Apart from the rugby matches that took place at Eden Park Stadium, a lot of rugby-around events were organised on 'distinctively Auckland' spots like Aotea Square, including a rugby festival with participating teams' appearance, live music, thematic exhibition and free festivities and attractions for kids.

The city event planners actively entered the international market with the purpose to secure major events that had a potential to deliver economic outcomes. This strategy predetermined the city's interest in sporting tournaments and championships that bring high visitation and positive financial indicators:

The reason [of focusing on sporting events] is because of quick wins. You can secure them quickly; you can get the benefits from them quickly. They have definitely looked towards the economic side of the matrix...ATEED focused a lot of its attention initially on trying to get economic events. Generally sports events (A4).

The city's successful participation in a variety of national and international bidding campaigns increased the level of expertise and confidence in Auckland's major events industry. Securing the right to host events of international significance, Auckland event planners guaranteed a progressive realisation of their outcomes-oriented objectives.

4.4.2 Strategy 2: ‘Diverse minimum’ approach in Wellington

In contrast to Auckland’s ‘maternity’ phase of major event portfolio development, Wellington entered the ‘early growth’ stage. The establishment of WREDA and necessity of new guidelines for major events sector determined the slow transformation of the currently implemented approach, which was coded as a ‘diverse minimum’.

Although WEP did not contain such terms as ‘portfolio of events’ (a term ‘programme’ is used instead), event planners in the city actively used it. The portfolio was described as a composition of events that the city owned or invested in. Key objectives of investment in events were stated in WEP and covered such areas as growing the economy and making Wellington an attractive destination to visit, to invest or to live in (Wellington City Council, 2012). The portfolio of events was expected to showcase and promote the brand of the city. In contrast to Auckland, in Wellington all three types of events (iconic/major, regional and community) were included into the portfolio. Major events, however, received more significant attention, as they were treated as a main contributor to the city prosperity, compared to small local festivals and regional events. To sum up, a general programme of events in Wellington integrated at least two portfolios of smaller community and regional events and major events. The list of 2014-2015 supported major events is presented in Appendix 6.

As already mentioned, until recently the whole event portfolio was managed by WCC events team. That approach influenced the compositional structure of the portfolio. Compared to Auckland’s focus on portfolio outcomes, Wellington event planners strived to achieve balance between different types and genres of events. This strategy was supported by WEP, where the delivery of diverse events (sport, arts, culture, music, food, and environment) was stated as one of the key policy’s directions (Wellington City Council, 2012). The recent establishment of WREDA, however, could significantly change this approach. The CCO would mainly focus on major events and their economic and image contribution. One of the first decisions with regard to major events was the increase of funding to attract and support major events. In the past, major events were sponsored together with other economically valued initiatives and partnerships from the Economic Development Initiatives Fund with the total value of NZ\$3 million. The new WREDA plan proposed NZ\$5 million investment in major events in order to achieve 1:20 economic return (Wellington City Council, 2015).

One of the fundamental characteristics of the ‘diverse minimum’ approach is a limitation of major events funds:

We only have a certain amount of money that goes around... Once we look at our portfolio of events for the following year, we have a small amount of dollars to fund so-called ad-hoc events. We do not have extra money to play around. We are looking at fundamentals to deliver... (W2).

The reason for limited investment opportunities lay also in the fact that Wellington utilised a multi-year contracting scheme, when a sponsorship agreement with an event promoter or owner was signed for several years. This approach did not give the necessary flexibility for event planners should any other advantageous event options arise:

We have multi-year contracts with many of the event organisers. That commits us to funding expenditure until the end of the contract. As we move through, some opportunities may arise to invest in other events that have just come to our attention. We are looking forward to 2017 when we will have some relief [contracts will expire] to be able to invest (W1).

On the other hand, such a situation simplified the process of annual investment allocation and event marketing and promotion: “We know what we are going to be investing in and what we have got coming up. We can work with this to plan our promotion and other things” (W1). In this regard, the most appropriate strategy with event funds should include the availability of miscellaneous spending that can be invested in events that might come to the attention of event planners during the course of the year.

Due to the limitations with available funds, as well as with other relevant resources (e.g., venues and city space), the portfolio of major events in Wellington was described as being “at its capacity” (W2). The capacity was characterised by the content-rich and resource saturation:

It would be fair to say right now, our portfolio...is at capacity. Unless you were to cancel one and say, right we will not do Diwali festival any more, and we will invest that money into something else (W2).

I can say that currently we have achieved a stage of saturation. We are limited with venues and open space... Our venues are busy for the most part of the year (W1).

The city’s event programme covered all the year. It was viewed as a balanced composition of diverse genres and themes:

I think there is a good balance of high quality ticketed events to free events down at the bottom end. Also in terms of demographic targets, it is a good spread as well. There is something on for everybody (W1).

The interviewees also noted that further event programming should probably be oriented more on 'in-depth' event development, where new elements would be designed and included into the programme of already existing events. Instead of building a completely new event, the idea was to widen the offered experience and audience of available recurrent events in order to refresh their content and attract new non-targeted groups of visitors and participants.

4.4.3 Strategy 3: Simplistic programming of events in Dunedin

Following Auckland's 'maternity' and Wellington's 'early growth' stages, Dunedin represented an 'introductory' stage of portfolio planning and development. This was characterised by a hereditary composition of the portfolio and a lack of strategy in major events programming. What was noticeable was an active role of the local community in major events planning and management. The absence of clear public goals and measures opened up room for the community to intervene major events sphere with new ideas and innovations.

Although the concept of event portfolio was mentioned in public documents (e.g., Dunedin City Council, 2012), it was not a popular term among the city event planners. Event portfolio was usually used as a synonym to a list of planned events that were supported by DCC. In other words, it was a synopsis of 'what is on' in the city:

There are some key events that happen every year. I do not think that all of them necessarily feel like they fit together into a portfolio. It feels a bit more ad-hoc, something that just happened over time (D3).

The list of major and premier events that obtained public funding in 2015-2016 year is presented in Appendix 7. The compositional structure of this portfolio list in Dunedin was influenced by the historical legacy of the city and its traditions. Many city major events were organised in an ad-hoc manner without any clear indication of their long-term objectives and purposes.

One of the key characteristics of the 'simplistic programming approach was the reliance of the city event planners on hosting events with a long community history. Interviewee D1 argued that in Dunedin many events were organised because "we have always done

them”. The adherence to the hereditary composition of an annual event programme was backed up by the argument that the community supported these events and did not want them to be changed or cancelled. Such orientation lacked critical evaluation of event feasibility and practicality for current city objectives. However, events that were supported by the community seemed to be more sustainable and embedded into the city life.

Although the establishment of the DFES structured funding procedures and regulated the relationships between key industry players in Dunedin, it did not affect the programming process. During the discussion of the applied approach in the city, interviewee D3 outlined that Dunedin was still at the stage of an ‘open market’ where all the organisers, owners or promoters of different events competed with each other for the opportunity to receive some funding from the Council. The event planners, who guided this process, did not clearly express the criteria for events, or the expected outcomes from hosting these events. Interviewee D3 argued that:

There is a value at somehow pulling it towards having a stronger sense that these are the events that the city supports. And doing a bit of a stock. Yes, this is a big event, but really is that the vision of Dunedin that we want to be selling, is that a story of the city that we want to sell? Or is it just about marketing? (D3).

A key to a successful implementation of the portfolio approach would lie in a consistent realisation of a strategic vision, when DCC clearly specifies and explains the criteria and expectations from the future events in the city. Currently, the city event planners employed a very descriptive arsenal of event criteria:

Things that we are looking for is a broad spectrum of events, a calendar that not just jet-packed in certain months, we want to have a good spread of events over the entire calendar year. We want events that cater the different parts of our community, so some events might have more of a young person’s focus and some might focus on older people. We want to ensure that we work with other key institutions in the city (D1).

A ‘free for all’ style also resulted in a situation when other departments of DCC organised their own city-scale events without any assistance from the Council’s events team. They used their own resources and budgets, and although such events did not get any financial support from the relevant event fund, they were officially included into the city event programme.

Because of the continuous reduction of the City Council funds, the interviewees in Dunedin emphasised the emerged difficulties with regard to planning an annual programme of events in the city. “1.8 staff” (D1) was responsible for both design and development of the local portfolio of events in the city. Interviewee D1 noted:

We are continuing budget reduction. It is difficult to be innovative. It is still possible; however, one of the major things on this way is resources. The staff is busy getting all these things done. There is lack of space to be innovative and creative (D1).

The shortage of funds and human resources significantly limited the city events team in an attempt to create a vibrant and attractive programme of events. At the same time, such dearth instigated the rise of community participation in the portfolio planning. The local community became a good ground for event ideas and a prospective starting point for developing interesting events. Interviewee D2 mentioned: “there are things that bubble up within Dunedin.... We have groups of people who are passionate about this”. Interviewee D1 expressed a similar idea: “We have a group of citizens getting together or organisations coming up with good idea and pitching” (D1). A good example is a Port Chalmers Seafood Festival, a fully community-designed event that obtained a major event status because of its embeddedness into local context and support from the whole community.

The situation with limited financial support for large-scale events left some room for innovation and creativity with regard to other events in the city. In 2014, the city officially supported the Dundead Pop culture and Science Festival, timed to the premier of the locally made short horror film about zombies. The event was very untypical to the heritage-oriented city; however, it succeeded in covering and blending such themes as science and modern pop culture and was enthusiastically accepted by the audience. All profits from the event were donated to the New Zealand Red Cross organisation.

Overall, the analysis of the theme ‘Applied portfolio approaches’ indicated that each of the studied cities developed its major event portfolio approach within distinctive local conditions. Current event-related objectives, availability of funds and city capacity influenced the nature of the approach and the ways of its realisation. The scope of the approaches in the cities varied from fully outcome-oriented in Auckland to an ad-hoc simplistic programming in Dunedin. Wellington’s ‘diverse minimum’ approach is situated somewhere in between, demonstrating an ability of city events planners to create

a solid portfolio of events under the conditions of limited financial resources and less clear strategic goals.

4.5 Comparing contextual environments in the cities

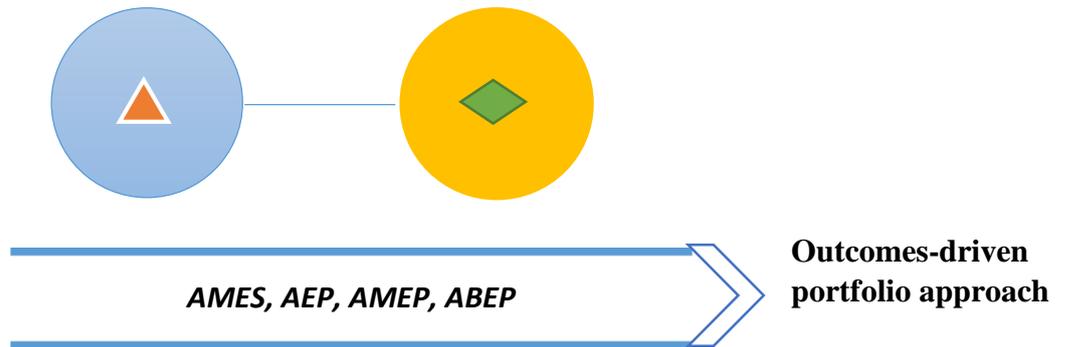
The analysis of the themes in this chapter demonstrated that the institutional structures, including institutional arrangements and event policy frameworks, influenced the strategic nature of major event portfolios in the cities under study (Figure 4.1). The separate management of events by a specific agency, as was in the case of Auckland, led to the elaboration of a more strategic approach to major events programming. Events were selected and grouped in a portfolio with the purpose to achieve certain objectives and outcomes, defined within applied event policy framework. This orientation on outcomes determined the distinction between a portfolio of major events and a programme of local and regional events. The applied outcomes-driven portfolio approach fit the general city strategy to position Auckland as a national economic centre, a vibrant and liveable place to visit and to live in. A set of public strategies and event policy provide a guideline for city event planners.

The agnostic programming of major events emphasises the new portfolio design aspects, when the attention is drawn not on the events' genre diversity but on the motivators that attract a wider audience and supplementary elements of celebration that add value to staging events. Recent city awards and positive economic contribution of major events backs up the rationale for this strategy and justified, at least in the authority's eyes, the significant investment into the major event sphere made since 2010.

In Wellington, prior to WREDA establishment, portfolio was viewed as a composition of different events, rather than a strategic grouping of investment assets. This composition included all sorts of events supported by WCC; however, major events had a strategic priority in terms of financial support and allocation of other resources. The creation of WREDA could instigate a revision of the portfolio concept towards an Auckland-like strategic approach. Relocation of major events programming under the jurisdiction of a semi-autonomous organisation could lead to the development of certain outcomes and evaluation criteria that major events would need to meet in order to be included in the portfolio.

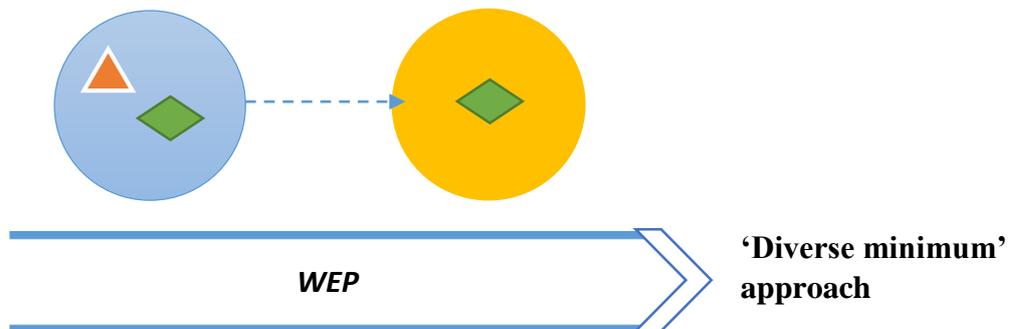
Auckland

Separate management of major events



Wellington

Transformative management of major events



Dunedin

Merged management of major events

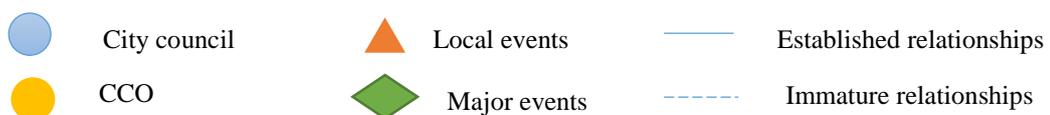
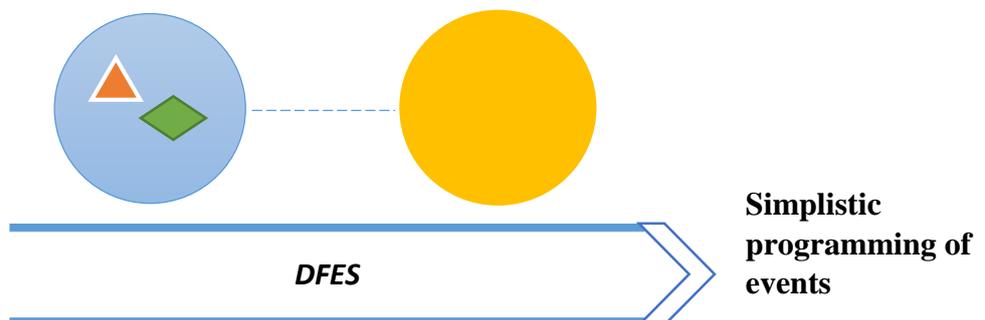


FIGURE 4.1: ORGANISATIONAL AND PUBLIC POLICY ARRANGEMENTS IN MAJOR EVENTS SPHERE IN AUCKLAND, WELLINGTON AND DUNEDIN

Data analysis indicated the existence of a relatively successful approach to major events in Wellington. In spite of funding and other resource limitations, the city event planners were capable of constructing an original and competitive programme of major events, which covered diverse themes and met the expectations of the local community. The changes in the institutional and organisational structures of the city may modify the 'diverse minimum' approach, which was discovered in Wellington. One of the benefits for the major events sector and the city's portfolio could be the creation of an Auckland-like 'one stop-shop environment' (W1), where events will be treated as an element of joint city strategies to increase the economic and tourism prosperity of the city.

The merged management in Dunedin, where major events were planned and delivered together with other local and regional events by the same team, created a situation where portfolio semantically referred to the overall listing of events in the city. Although the city event planners understood the value of the portfolio-style event programming, this concept has not yet been utilised. The current intention of the city event planners to revise DFES and its goals could provide grounds for a more integrative major events approach. Enterprise Dunedin was expected to play a more active role in major events management in order to facilitate the inclusion of events into the sphere of the city economic development. The current approach to major events programming in Dunedin was characterised by the interviewees as an ad-hoc variation of the event strategy: "We do what is easy. It should be a step from this to think about what could be best..." (D1). A lack of sufficient funds and the reactive way of the Council's intervention into the event industry called for a revision of the current event policy and the city government's role in the process of event planning and development. At the same time, the strategic weakness of the applied approach highlighted the importance of the local community, which had an intention to increase Dunedin's eventfulness and expertise to do so.

To sum up, the contextual environment played a critical role in major events portfolio planning and managements in the cities under study. Different levels and stages of its development affected the strategic perspectives of event portfolios, the realisation of portfolio objectives and overall growth of local event industry. The degree to which the explored institutional structures and policy frameworks affect the foundation of portfolio approaches in the cities depends on the organisational arrangements and availability of written regulations, rules and protocols.

4.6 Summary of the chapter

This chapter presented a holistic analysis of the institutional arrangements in the three cities. Each case demonstrated specific features with regard to major events programming and development. The chapter revealed the interrelations between institutional and policy environment in the cities and the strategic nature of the utilised portfolio approaches. The discovered contextual commonalities and differences in the cities under study set the ground for the exploration of critical aspects of portfolio programming in the cities. The next chapter introduces an analysis of emerged themes that explain the underlying layers of portfolio design, portfolio assembling strategies, critical design factors, perceptions about portfolio balance, strategic scheduling and leveraging of major events.

Chapter 5: Critical aspects of portfolio programming

5.1 Introduction

This chapter introduces the findings related to the key aspects of major event portfolio programming in Auckland, Wellington and Dunedin. Data analysis in the previous chapter indicated the influence of local institutional structures and event policy frameworks on the foundation of event portfolio approaches. This chapter explores how city event planners design and manage portfolios of major events within identified contextual environments. It addresses the second and the third objectives of the research, which are to identify the underlying layers of portfolio programming and examine key areas of event portfolio design in the three cities.

Thematic analysis of interviews and documentation identified an interplay of four cross-cutting themes that explain key aspects of portfolio programming. The first theme, ‘Place desirability through hosting major events’, examines the rationale and reasons for designing portfolios of major events. It explains the essential meanings cultivated by city event planners around the value of major events and their strategic grouping in portfolios. The next theme, ‘Portfolio assembling strategies’, focuses on tactics that city event planners use to construct portfolios of major events. The third theme, ‘Critical design factors’ analyses factors which affect portfolio design in the selected cities. The fourth theme, ‘Portfolio integrity’, discusses the aspects of portfolio synergy development. It focuses on portfolio balance, event scheduling and leveraging. As in Chapter 4, quotations from interviews and documents are used to support the researcher’s arguments.

5.2 Emerged theme: Place desirability through hosting major events

This section examines the rationale for designing portfolios of major events in Auckland, Wellington and Dunedin. It describes the desire of city event planners to use major events as a tool to enhance and promote the expected desirable city profiles and their competitive points of differences. Two sub-themes will be analysed further: ‘Constructing place identity’ and ‘City eventalisation’. The first sub-theme explores how cities utilised events in order to construct their unique competitive identity. The second sub-theme focuses on the role of major events as co-producers of city spaces.

5.2.1 Sub-theme: Constructing place identity

The understanding of why hosting portfolios of major events was important for Auckland, Wellington and Dunedin was rooted in the vision that a strategic grouping of events and their planned delivery could significantly contribute to the development of city personality and distinctiveness or, in other words, unique place identity.

In Auckland, place identity was expressed in the concepts of city liveability and ethnic diversity. Public documents described liveability as being a globally connected city, an internationally competitive destination, a city that attracts talented people (Auckland Tourism Events and Economic Development, 2011, 2013b, 2013c). Liveability reflected a diversity of experiences which visitors and locals could enjoy while exploring the city, including nature and urban attractions:

We often talk about dualities of Auckland: great beaches, a nice harbour, lots of places where you can enjoy wine, and food, and so on. You can be surfing on the west-coast volcanic beach in the morning and fishing in white sand beach in the afternoon. You can be at wine-tasting on a winery in Waiheke for lunch and dining in 5 star restaurant. And this is all on a very small geographic space. That is really Auckland's strength (A1).

Another aspect of liveability correlated with a sense of pride and enjoyment of being a city resident. AMES stated that major events should “make people proud of who they are, where they live by making Auckland more interesting and exciting” (Auckland Tourism Events and Economic Development, 2011, p. 14). Interviewee A2 reflected of this: “We do always ask within our events, when our post evaluation is, does it make you proud of Auckland? Do you think that events make Auckland a more exciting place to live?”

Auckland's ethnic diversity was another key factor that contributed to the city's uniqueness. Some major events were labelled as ‘distinctively Auckland’ because of their thematic orientation on celebrating cultural and ethnic variety:

Something like Pasifika Festival is very distinctively Auckland. We have the largest Polynesian city in the whole world. There is no other city in the world that could have all those different communities to that extent engaging with broader community at that level... Polynesian context. That is distinctively Auckland (A2).

Another example is the three-day-and-night Lantern Festival, a big Asian festivity in the city during the Chinese New Year celebration. Such events, to a major extent, were oriented on achieving positive social outcomes, or developing ‘internal’ characteristics of

a desirable place. Other major events like large-scale sporting tournaments were seen by the interviewees as a solid contribution to the 'external' city identity, including recognisable city image and visitor attractiveness. An example is the ITU World Triathlon Series. This is the International Triathlon Union's annual series of triathlon events, including stages in such destinations as London, Hamburg, Chicago and Cape Town. In 2015, Auckland hosted the second stage. The entire series usually broadcasts online which guarantees a huge international exposure for a host city, showcasing attractive cityscapes.

While Auckland presented itself as a multi-ethnic and liveable place, Wellington was promoted as a vibrant centre of creativity and art:

Embraced by a natural amphitheatre of ocean and hill, Wellington merges big city culture with small town charm. A lively energy pulses through what is celebrated as New Zealand's arts, film, coffee, culinary, craft beer, events and political capital (*The coolest little capital in the world*).

However, major events were expected to deliver the same strategic outcomes as in Auckland: to demonstrate that the city is the best place to live in, to leverage the city's identity as a creative and cosmopolitan capital, and to enhance its image of an event city. The intention of the city's brand and event managers was to emphasise the competitive advantages of Wellington as a visitor and event destination: "It is all about being a bit different from anywhere else in New Zealand. The things that we value being a small city" (W1).

Answering the question about the distinctiveness of the city, interviewee W1 marked the small size of Wellington as one of the positive aspects: "People do recognise Wellington as a small compact city with a good nightlife, cafes, restaurants, walk-distance to all famous places" (W1). The compactness of the city centre provided event planners with a unique opportunity to embrace all the city attractions and showcase the city as a unitary modern, creative event area:

From the time you get off the plane in Wellington and come to the city, you have this pre-event experience, our restaurants and bars, entertainments, your taxi ride, nightlife here. Wellington has got a point of difference here and we need to...our challenge is getting better at telling that story (W2).

In Dunedin, city brand managers invested a lot of effort in developing a distinctive city identity: "more recently Dunedin is becoming more aware of itself as a city. It has done

a lot of work around branding and what is cool about Dunedin” (D1). Interviewee D3 supported this observation by pointing out that Dunedin “is starting to voice its culture a bit more, takes more pride”. Dunedin has been viewed as ‘a family friendly and event-rich destination’ (D2). DFES stated that “Dunedin is known for its unique wildlife and respect for the environment, extensive heritage and cultural offerings, its hospitality, its passion for sport, education and knowledge” (Dunedin City Council, 2009). In addition, the city was awarded a UNESCO City of Literature title:

We are now a part of the UNESCO creative cities network. First in New Zealand. We are always saying that we are a cultural city but now we are a part of creative city network. We are getting a little bit deeper into our creative community (D2).

The respondent D4 labelled Dunedin as a compact city of contrast, where wildlife attractions organically coexist with gothic architecture and modern arts. Many events in the city were designed to highlight the diverse ‘experiencescape’ and attract visitor attention. Interviewee D3 made a clear association and correlation between major events and place uniqueness:

Auckland, Melbourne, they do their events really well, very well marketed. You associate Sydney with lighting, Melbourne is probably more about food and Auckland is now very focusing on the harbour area for events there. For us to succeed in this it needs to be something distinct and tell a really cool story about Dunedin (D3).

A true Dunedin event that clearly emphasises the distinctiveness “has to be something that could not just be moved from here to another city” (D3). An example is the Midwinter Carnival, an annual street event, which is usually timed to the longest night of the year in June:

We celebrate our midwinter. This is the shortest day and the longest night. We are not saying we try to be a beach destination. We are saying, this is the midwinter and we are the lowest part of the world, we are celebrating the fact this is where we are, come and join us is this carnival (D2).

In brief, the analysis so far has demonstrated that city event planners understand the importance of the development of a unique place identity through major events, which can be utilised as a competitive advantage of the city. Different visions cultivated in the cities under study - liveable city, smart and cultural capital, event-rich city of contrast - were planned to highlight the distinctiveness of the place and its desirability to visitors,

locals and international business. The cities' overarching ambitions to become desirable places tended to be achieved using a strategic blend of city images and major events programmes, which attract national and international attention and highlight local points of difference.

5.2.2 Sub-theme: City eventalisation

The sub-theme 'City eventalisation' explains the effectiveness of major events as constructors and co-producers of cities as event and experience spaces (Smith, 2016). In Auckland, it was expressed as a 'buzz effect' on the streets. In Wellington, major events were expected to deliver the 'whole experience' of the city. In Dunedin, event planners tried connecting events with a 'city flavour'.

By delivering a 'buzz-effect', city event planners in Auckland animated public spaces. Major events were used to bring life and festivity to city streets. Interviewee A2 mentioned the 2011 Rugby World Cup as a good example of city animation. International visitors and supporters crowded the city streets, new facilities and fan zones were created, and some public spaces were thematised for the event. Social-oriented major events such as Pasifika or Lantern festivals also add a 'buzz' to the city. They become part of a city's cultural DNA. During the run of these events, city parks were transformed into stages where a diverse array of performances and celebrations highlight the city's multiculturalism and ethnic diversity.

In Wellington, event planners concentrated their efforts on the delivery of a multifaceted city experience to the event visitors and participants:

When people come to Wellington we do not want them just go to the stadium, watch the game and go home, we are looking at what they can do in fan zones and fan trails. We talk with our tourism team about what they can do with the hoteliers, restaurants and bars to theme things around the match (W2).

Exploiting the city compactness, event organisers and city event planners used any opportunity to transform an event into a 'whole city experience'. The question was how to make any hosted event uniquely Wellington and how to position the city via hosting events: "If we are a creative capital, how do we supplement [events] with the elements of creativity?" (W1). The city events' team organised different street performances, drummers' competitions and street art exhibitions, with the purpose to engage event visitors (e.g., attendees of a rugby game) and general local public into a kaleidoscope of

city festivities and attractions. Expecting the 2015 ICC Cricket World Cup and 2015 FIFA U-20 World Cup, WCC constructed a big green artificial turf playground at the central Civic Square. This construction converted this area into “a more relaxed kind of recreational space that will be our fan zone, fan hub” (W2). Pre-event and post-event experiences, including street entertainment, meals in local cafes and restaurants, visiting of creative art zones transformed the city into an interactive space.

According to interviewees in Dunedin, the hosting of major events emphasised city uniqueness in terms of its history, gothic architecture, Scottish cultural legacy and high education. City event planners looked for “a distinctive Dunedin flavour in events” (D3). Such events showcase city areas of socio-cultural importance. They are anchored in the community and stand out as part of the city’s culture:

You might have seen the Dunedin’s gothic logo. There is a big story behind it. A lot of it is around heritage but also the contemporary side of Dunedin that we need to be intriguing, authentic. Many Dunedin events reflect that (D2).

Events that met these criteria delivered a valuable experience to city visitors and local residents. People got time to experience the city and its historically important areas in addition to attending or participating in an event:

They [events] are very important for us. Through an event, someone can go and experience what we call a cultural city. So ID fashion week. That is very important. Dunedin is a place where fashion has become part of the fabric of the city. Visitors can experience the city by going to this event. They also can experience the city by going to the Cadbury Chocolate Carnival. That is our heritage. The factory has been here for many years (D3).

Some large-scale city events were used to revitalise depressed city districts:

We often organise events in order to assist with the regeneration of areas. A lot of our work is around trying to get buildings re-used, get areas functioning better economically again... (D3).

A new, full-covered stadium was constructed in the city in order to host rugby and football games at any time of the year. Although this project was not supported by the local community (“There was a sort of bad feeling between some parts of the community and the council (D3)”), it played a critical role in the 2015 FIFA U-20 bidding campaign and provided the city with a beneficial point of difference.

Overall, the analysis of the theme ‘Place desirability through hosting major events’ demonstrated that the desirable city profiles and images of Auckland, Wellington and

Dunedin were constructed around distinctive city features, including geographic location, city history and traditions, and available visitor attractions. The official vision of each city, formulated by its leaders and conceptualised within event policies frameworks, played a salient role in major event programming. Major events provided an array of opportunities to emphasise and promote the distinctiveness of cities, their competitive assets and points of difference. Despite the contextual differences in the cases under study, this theme clearly exhibited the similarities in a strategic visualisation of major events as contributors to city desirability from both visitor and resident perspectives. Events offer exclusive experience of the city, its culture, history and contemporary life.

The fundamental desire of the cities to posit their attractiveness and desirability through major events instigated the development and realisation of portfolios of major events. The assemblage of events in portfolios provided event planners with a strategic opportunity to extend a positive effect from staging events during the course of the year. The next section will thoroughly analyse portfolio assembling strategies in Auckland, Wellington and Dunedin.

5.3 Emerged theme: Portfolio assembling strategies

This theme focuses on the analysis of the identified main portfolio assembling strategies, utilised by city event planners in Auckland, Wellington and Dunedin. Assembling strategies refer to the ways in which major events can be included into portfolios. Five strategies emerged from the data analysis. These are owning of events, growing of events, creating events, sponsoring events and bidding for events. Although the contextual diversity of the cities affected the importance and rationality of applied strategies, it was possible to identify and analyse their key features.

5.3.1 Strategy 1: Owning of events

There are major events that are owned by a city or by event organisers, located in the city. In Auckland, ATEED invests in such events on a multi-year basis. Current examples are the Pasifika Festival, the Lantern Festival, and the Dick Smith NRL Auckland Nines. In Wellington, there are at least four so-called iconic events, which meet the criteria of being 'distinctively Wellington'. These are the New Zealand Festival, the World of WearableArt, Wellington Sevens Rugby tournament, and the Cuba Dupa street festival. Dunedin has its premier events, including ID Dunedin Fashion Week, Dunedin Cadbury Chocolate Carnival, Dunedin Mid-Winter Carnival and Port Chalmers Seafood Festival.

These are all essentially community major events that are hosted in the city annually. They comprise a pool of events, which economically and socially fit the fabric of the multi-national community in New Zealand and, in these cities, reflect the assets and distinctive attributes of the host places, and meet general requirements of city event policies and strategies. Interviewees in Auckland emphasised the necessity to design their portfolio around such annual events with a permanent locally-based management and supply structure:

Ideally, the best ones [events in the portfolio] are those home-grown. You control the property of the event, you control its destiny, and you are not spending money investing in rights, fees, which generally go offshore to the right holders, to the international federations or whatever it might be (A4).

Interviewees from Wellington and Dunedin did not clearly emphasise the idea of a portfolio construction around a pool of owned events. However, WEP, for example, accentuated the important role of such events. (Wellington City Council, 2012). One of the policy objectives was to develop, grow and maintain regular iconic events in the city which have a strong international and national recognition and grow tourism in the region. DFES in Dunedin also demonstrated the understanding of the local authorities of the benefits that home-grown events could bring to the city: “An event that grows within the community and is a true Dunedin event is more likely to be one that will result in economic benefits” (Dunedin City Council, 2009, p. 14). Interviewee D3 amplified this point of view, emphasising that owned events were capable of bringing an array of regular benefits. This includes new permanent jobs, long-term leveraging and legacy opportunities, accuracy in planning and event funds distribution.

5.3.2 Strategy 2: Growing events

Growing already existing events to a more significant status of major events is another community-oriented strategy of portfolio design. For this reason, a strategic scanning of the event horizon in a city is required in order to identify potential candidates for promotion. Interviewees A1, W1 and D1 noted that they did not have any clear step-by-step protocol on how to analyse the total population of events in the city. Usually it occurred during regular meetings with local boards and event organisers while discussing current performance results of city events and their perspectives. Interviewee A1 mentioned:

In terms of the growing, that is something that we are all responsible for through the rest of the major events group. So, we have a regular meeting with Auckland Council to talk about their investment, where they might be. And we are also scanning the horizon with the local boards to see what might be on their radars. It's not anyone's specifically defined role but it's something that we are all very conscious of (A1).

The example that illustrates the application of this 'picking the winners' (A5) method in Auckland is the Art in the Dark Light Festival. The creation of this small local event was initiated by a group of entrepreneurs who decided to organise a free art event, focused on light installations in parks in the night. The event was warmly accepted by the audience and professionals from the creative industry. Initially, it was funded by the local board for a few years. The organic growth of this festival brought the event to the point where a lot of potential appeared to elevate it further. As a result, in 2014\2015 financial year Art in the Dark Festival got a status of a major city event, received sponsorship from ATEED and was included into the portfolio of major events.

A similar example comes from Wellington. Cuba Dupa was a street festival and parade that happened around Cuba Street in the centre of Wellington. Although the event was popular, it ceased because of the lack of funding. It was not organised for 2011 and 2013. In 2015, a decision was made to restart the project:

That was something that the public was actually very keen to see come back. Those calls resonated with the right people within the council decision makers. It has the potential to grow into our iconic event (W1).

Growing of events is a promising but very time-consuming way of event portfolio programming. On the one hand, events that have been naturally created and grown in a city tend to be more organic and sustainable in terms of their embeddedness into a city's fabric, their ability to tell 'the true story' about the host place. On the other hand, such events usually take a long time to build, develop and give return on investment. Sometimes, events fail and stagnate in their development, despite support from the city authorities, as happened in Dunedin with the heritage festival. Change of organisers and festival topics led to event stagnation and public disappointment:

I thought it would grow to something better than it was before. I think the last year festival [Heritage festival in Dunedin] was the most disappointing. They hired different event organisers. Their ideas did not align with the event. They did nothing with the heritage... (D3).

Overall, owning and growing represent sustainable ways of portfolio design, where attention is concentrated on the locally developed events. Such events possess valuable characteristics of embeddedness, integration into community life; they reflect social cohesion and community shared meanings.

5.3.3 Strategy 3: Creating events

New events can be created and included into the portfolio in response to market demand, current portfolio gaps, or city status requirements. In Auckland, it was identified that, as a ‘global city’, Auckland lacked some types of major events, for example, a gay and lesbian festival. In 2012, Auckland Pride Festival, a new multi-day event, was launched and immediately included into the portfolio of major events. Recently, city event planners worked out a concept of a new signature festival focused on indigenous Maori culture and traditions. The goal was to produce a ‘distinctively Auckland’ festivity, which celebrates the Maori context of the city existence and highlights the city’s and New Zealand cultural heritage:

One of the gaps that I’ve mentioned before is that we do not have a cultural Maori event... a festival of significance in Auckland. We have Waitangi day, Matariki festival. But they are not to the scale that you will expect for a country that has such Maori element, so entrenched in its everyday way of life. There should be something more than that. It is an obvious gap (A2).

Interviewees A2 and A5 also emphasised the absence of a recurrent event that would have a significant profile in Asia and, in particular, in China. Considering China is one of the key markets for New Zealand from a business perspective, it was important for Auckland to create an event that would be able to promote the city and its opportunities, as well as showcase the liveability of Auckland to potential visitors and skilled migrants from China.

Wellingtonian event planners utilised a ‘creating an event out of something that happened in the city’ approach (W2). The city leveraged opportunities which emerged from filming of the world blockbusters ‘Lord of the Rings’, ‘King Kong’ and ‘Hobbit’. One-off film premier events and accompanying thematic parades became a solid addition to the annual programme of major events in the city.

Some new events can be initially created as an accompaniment to larger or one-off events, and then obtain a permanent independent status. In Dunedin, this is the Port Chalmers Seafood Festival, initially created to entertain the 2010 Rugby World Cup attendees.

Another example from Dunedin is a Vogel street party. This event was created in order to promote the redevelopment of one of the city's neighbourhoods, create vibrancy and celebrate street arts. After the initial success, it was announced that the events would become an annual celebration of arts, lights and street culture.

Creation of new events is a more resource-consuming version of the growing strategy discussed above. It demands clear understanding of the community objectives, economic and socio-cultural goals of the host city, as well as a strong network of stakeholders. Newly created events require extra attention from city event planners because such events still have to gain favour from the local residents and city visitors. To minimise the risks from building from scratch, cities applied annual sponsorship rounds to support one-off or periodical events that were not anchored in the community but can deliver significant positive outcomes.

5.3.4 Strategy 4: Sponsoring of events

Many events in Auckland, Wellington and Dunedin were selected through an annual contestable sponsorship round, where event promoters and organisers could participate and submit applications for funding. These events were not owned by the city. They were selected and supported, if a potential existed to achieve desirable benefits and outcomes:

... An event would come to as a part of annual sponsorship round. That means that we go out to the events industry, we say, we are inviting events that think that they might achieve outcomes of the major events strategy to come to us with their proposals and we will consider funding... (A2).

The interviewee W1 from Wellington expressed a similar vision on sponsoring events that could bring positive results:

We definitely have particular goals, which are led by a long-term plan, strategies. We are not just going for something because it exists; we are going for something because it helps us to achieve our goals (W1).

The same approach to the selection of major events existed in Dunedin, where events got sponsorship funds if they met the criteria stated in DFES: "Then we have 400,000 dollars for major and premier events. Applications for that are once a year and they are to meet criteria outlined in events strategy" (D1).

The strategic selection of major events for sponsorship in the cities under study was supported by an evaluation procedure where event proposals were assessed and comparatively analysed. The primary objective of a feasibility analysis was to determine whether the allocation of sponsorship funding would produce desirable outcomes and meet the attributes and objectives stated in event policies and strategies. At the time of the research only Auckland had a specialised feasibility team within ATEED, responsible for analysis and evaluation of the proposed major event projects. The other two cities carried out such activities on a less structured level. This fact significantly influenced the scale and detail of the feasibility studies, and it also affected the level and amount of the obtained data from the cases.

A feasibility team within ATEED conducted the analysis of an event concept, budget and potential audiences. As an economic development agency, ATEED was interested foremost in economic impacts. Such indicators as number of visitors, visitor spending and visitor nights, flow of money in and out of the city were scrutinised:

The first thing we want to look at is kind of economic impact. We would do an assessment, which we might run in house or we might go externally depending on the value of the event and the complexity of the event as well. Once we worked out the alignment of the event (visitor nights, economic outcome, international exposure)... if it is clear that the event is really in alignment we might then do a high-level assessment. If there is no alignment, we would probably reject the proposal, if there is, we would go in more detail around... (A3).

Similar to Auckland, in Wellington and Dunedin the criteria for major event selection were primarily set around economic indicators, for example, bed-nights and number of external visitors:

I understand that there is a formula that is based around the number of bed-nights. That formula is applied to the information that is supplied to us, how many people are going to come out of the region, staying how many nights (W1).

We rely heavily on statistics and commercial visitor nights (D3).

The assessment process in Auckland usually depended on the amount of sponsorship funds required and the level of possible risks the event can bring:

...we would look how the event...will the event be able to operate in the city, have they got venue? Are there major concerns in terms of running the event, the transport, and all those types of things. If there are some concerns, then how much they will cost. We would do an assessment of an event budget as well. Is this budget sufficient to allow the organisers to deliver the event? Are there any costs they have forgotten? Did they actually need this amount of money they ask from us? And then, we do a risk assessment as well. Detailed analysis of risks involved in the event. We would look at any negative implications. We would take all this information and work out what are our options as ATEED (A3).

The feasibility study of major events in Auckland included event history and background research, market research, competitor analysis, operational and risk analyses. Background research shed the light on the origin of an event, its organisers' experience and their track records. Market research and resident surveys helped to understand the potential of an event to attract and engage the audience. Competitor analysis indicated the existence of substitute events in Auckland or similar events in other cities in New Zealand or even worldwide. This gave an opportunity to understand how they could affect the organisation of the event under study. Operational analysis included the evaluation of event-related resources, suitability of the proposed event venue and sufficiency of the event budget. All potential concerns in terms of running an event like transport issues and venue access were also carefully scrutinised. Risk analysis included the evaluation of both organisational event-related risks (budget, meeting KPI, competition with other events) and reputational risks for ATEED (loss of investment, failure to deliver a successful event).

A body of evaluation parameters and results from previous feasibility studies was used to benchmark events against each other. This enabled Auckland portfolio planners to do some modelling around assessed events and speculate on the possible outcomes of their intervention. Interviewee A3 noted:

We use AMES as our foundation. We have a body of events that we understand how they operate and what happens with them. So, we can look at the amount of investment we would expect to achieve those things with. We use a body of evaluation from previous events to understand the likely outcomes (A3).

After the completion of the feasibility study, a successful proposal was signed by ATEED's Board. ATEED might contract some particular conditions and outcomes. A certain proportion of the funding for an event was a conditional plan for achievement of

the KPI. It was based on the economic assessments of an event. The final amount of sponsorship money depended on the ability of an event to meet all the KPI requirements. If, for example, event organisers were not able to guarantee the broadcast in Australia, which was one of the key markets for New Zealand, that might affect the amount of investment into their event project.

The available data from Wellington and Dunedin did not provide any detailed description of the evaluation process and feasibility study of the major event proposals. Interviewee W1 briefly described the process as follows:

Those event organisers or creators, they come up with those wonderful things and may want some money...They will approach us, complete our development fund application form which is then assessed by a number of people for some comment and then the decision is made by the government committee (W1).

Examination of the application forms gave some additional insight on how this process works. The Council Events Assessment Group was responsible for the fund distribution. It based its decision on the provided information, such as event coverage, budget, visitations and operational management. What was interesting is that, in Wellington, social orientation of a major event put it automatically into the category of community events:

We really challenge event organisers to define themselves, what they see their event is doing. If there is a great social benefit through the event then I would potentially lay it towards the community events, if there is a potential for a quite significant return, economic benefit, then potentially they need to go into a major event (W1).

In Dunedin, prior to the development of the official city festivals and events strategy, the process of sponsorship funds distribution was organised on a very ad-hoc base:

Before this existing event strategy, event organisers would come to the annual planning meeting of the council, and said look we want to run this cool event, the council would vote for this, yes or no (D1).

After the strategy was introduced, the process obtained a more strategic character. Funding for major events in Dunedin is administered by the Events Assessment Subcommittee within the Community Development Committee. An event should contribute to the positive regional and/or national profile of the city, generate significant economic wealth and attract a substantial audience.

5.3.5 Strategy 5: Bidding for events

Bidding strategy was present in all three cities. The depth of the approach varied significantly due to the current city objectives and available financial resources. Bidding for one-off events of international and national significance became an essential element of Auckland's outcomes-driven approach, discussed in Chapter 4. The targeting of events was generally focused on their ability to align with the city objectives, as well as on their competitive assets and available infrastructure. The Volvo Ocean Race Stopover 2014-2015 can be mentioned as an example of a successful realisation of the bidding strategy. The event's theme, which was sailing, fully corresponded to the image of Auckland as a 'City of Sails'. It attracted international visitor nights through participating teams and corporate guests. The event also showcased the city harbour and increased the awareness of the local marine industry.

Whereas Auckland had resources and expertise to place bids for events independently as a host destination, as well as in conjunction with other cities in case of national bids, Wellington and Dunedin usually participated only in national projects:

The major World Cups [2015 Cricket World Cup and 2015 FIFA U-20 World Cup] is a good example of us bidding to host something. Usually those tender documents are sent out to all major cities and we go through and diligently complete all the information that is required. A part of that is looking at what we actually would bring to the table as a city to make our city more attractive (W2).

Lack of resources, including funds, was indicated as the primary obstacle on the way to bid for exclusive events in these two cities:

We also have to work with our venue spaces. Could we ever get a big event, we do not have the audience. We do not have infrastructure to host these events (W2).

Researcher: Do you bid for events separately from the national organisations?

D1: Not a lot. I have been involved in events for a couple of years. We do not do what I have heard other cities do, like bid for Supercars [in Auckland]. We do not have enough money. This is the main obstacle... (D1).

Such collective bids gave an opportunity for Wellington and Dunedin to become a part of a large international project and get some benefits as a host city:

The funding required for the bid [2015 FIFA U-20 World Cup] was quite high. We say, we cannot afford that. But we have a stadium with a roof. That is what we can provide (D1).

Large-scale events such as the 2011 Rugby World Cup, the 2015 FIFA U-20 World Cup and the 2015 Cricket World Cup were seen as a unique opportunity to put the city and the whole country on the international stage as a major events host and get a good track record that increases wins in the future:

I think, there is a desire to put New Zealand on the stage as a major events host. To put a hand up and say yes, we can host events of this size and schedule so there is a degree of prestige associating with this (A1).

That would be a classic example of New Zealand's capability to hold major events. We have the infrastructure, we have the venues, the major sporting venues, we are prepared to run major sporting tournaments, and 2011 Rugby World Cup was a great example. That is a legacy of what we can showcase during the FIFA U-20 World Cup (W2).

Sporting events constituted the main part of bids which Auckland, Wellington and Dunedin have participated in. One of the key rationales was a predominantly economic slope of local event strategies where the majority of objectives were measured in investment and financial terms (visitor nights, for example). Sporting events were able to deliver quick return on investment. The example is the 2014 World Tennis Veterans Championships hosted in Auckland. Although the event did not have a significant spectator component, as the major part of the audience consisted of participants, it nevertheless generated solid immediate economic returns for the city.

Such a tendency coincided with the overall national vision of major events. The operational evaluation of the Major Events Development Fund in New Zealand for 2010-2012 (Ministry of Business Innovation and Employment of New Zealand, 2013) showed that sporting one-off events represented 78 per cent of events that received funding (13 sport events and five cultural). They captured 87 per cent of all investment. This consistent pattern reflected the first priority stated in the updated NMES to invest smartly in events with the most potential for economic return. Large-scale sporting events were in general more aligned with the range of benefits national government and city councils intended to achieve and capitalise on.

Although recurring major events could deliver an array of positive social and cultural outcomes, they did not meet the requirements for net economic benefits that one-off

events did. Interviewee A2 pointed to an array of significant benefits that a successful bid for an international sporting event might bring:

It [2015 FIFA U-20 World Cup] has got an international profile, there is a liveability element because we bring in some of the world's best players here that we would not otherwise have the opportunity to see. It definitely will have an impact on visitor nights, on Auckland's economy (A2).

Strategically, one-off major events were important not only with regard to tangible benefits to Auckland, but also in the wider context of opportunities they bring:

...There is more that can be done off the back on an event. So, like I've mentioned before about FIFA Women's Cup. It is probably the biggest women sporting event in the whole world. What an opportunity for promoting things beyond sport for women in New Zealand: women and governance, women and sport, women and business, all that sort of thing off the back of a very significant international women's event. Sometimes it is almost not about the discipline itself, it is around what that discipline has attached to it (A2).

However, according to interviewee W2, there was always a risk of 'unknown' when city event planners bid on and include one-off events into the portfolio. First, usually it was unpredictable, how a secured event would be run in a new city, within new contexts. Second, city event planners had to put a lot of effort to promote a new event and attract sufficient attention to this event and the city as a host destination. Finally, the potential for an unsatisfactory legacy also existed.

Overall, the analysis of the theme 'Portfolio assembling strategies' demonstrated that the applied strategies were oriented on the delivery of events that matched the requirements of current city goals and objectives. Bidding and sponsoring strategies targeted economic and prestige-oriented goals, while, for example, creating and growing methods tended to be more proactive and community oriented. The utilisation of different methods allowed city event planners to montage their annual portfolios in a way that provided the freshness and originality of the event programme. The distinctive city contexts determined the dominance of one or another method. Thus, Auckland was in a position to invest significant funds in bidding and sponsoring, whereas Wellington and Dunedin were concentrated on less expensive strategies, such as the growing of already available events.

Utilisation of the assembling strategies requires consideration of external and internal factors that influence portfolio design. The next section presents a detailed analysis of the identified critical design factors in Auckland, Wellington and Dunedin.

5.4 Emerged theme: Critical design factors

Design factors refer to external and internal circumstances that affected event portfolio design in the studied cases. This theme analyses the interplay of four such factors: geographical location and seasonality, local resources, market demand and industry capability. Each of the identified factors influenced the compositional structure of the portfolios. A factor of geographical location and seasonality affected the distribution of events throughout the calendar. Local resources determined the availability and capacity of particular assets, including infrastructure and financial mechanisms to run and support major events. Market demand influenced the orientation of event planners on particular event genres and target audiences. Industry capability delineated the overall expertise of city event planners to plan and manage portfolios of major events.

5.4.1 Factor 1: Geographical location and seasonality

Distance was identified as one of the challenges that influences the development of the event industry and market in New Zealand in general, and in Auckland, Wellington and Dunedin in particular:

The biggest challenge I think for us is distance. We are a long way from anywhere and that has implications both in terms of time and in terms of cost. So, that is a challenge (A1).

Accessibility is also important. Location of the city (W2).

People find it hard to get to the city. Often you do multiple flights. No bus route. Flights are expensive (D3).

Geographical remoteness had implications both on time and on cost. As a result, it affected the ‘assortment’ of events and audience numbers. Portfolio design requires an extensive evaluation of this factor in order to mitigate the influence of distance and organisation and travel costs. Moreover, as the interviews indicated, geographical location impacted on the availability and capacity of target markets. In the case of New Zealand, the closest significant source of visitors was Australia. Many destination promotion and events campaigns were oriented on this particular market. Another large targeted area was China. Because of a high proportion of Chinese migrants in New Zealand and strong economic ties with this country, event planners in Auckland, and to some extent in Wellington and Dunedin, directed their efforts to position their cities as attractive destinations for Chinese tourists and event attendees.

Geography, however, can also play a positive decisive role in event bidding campaigns when a decision to host an event is made due to the suitability and benefits of the destination's location. That was the case of the 2014-2015 Volvo Race Stopover in Auckland:

Sometimes geography is an advantage. The Volvo Ocean Race is a great example of geography being an advantage...They are going around the world; we are in the middle of a very big ocean. Where else do you stop? New Zealand is where it is. This is an opportunity to capitalise on (A2).

Many events in the cities were organised in open venues. Thus, the weather conditions were quite an important factor for both event organisers and portfolio planners. The interviewees argued that the summer season from October till April offered well-developed and saturated event programmes, whereas the winter season from May till September lacked major events because of the unpredictable weather:

For Auckland as it is for all of New Zealand, there is a seasonality issue where... we are extremely busy in events and tourism space over summer months, and then it drops down over winter (A2).

You will find in our calendar a lot happens between January and March because a lot of events we have outdoors and Wellington's weather is very unpredictable...From May to the beginning of September we have a quiet event season (W2).

Quite often for Dunedin, seasonality is the main factor for choosing events (D2).

Overall, event planners in the three cities considered location and seasonality more as a reality rather than an emerged challenge. This reality demanded a strong consideration and relocation of available resources in order to solve the problem of low and shoulder seasons as well as to attract more local, national and international visits.

5.4.2 Factor 2: Local resources

The findings specified infrastructure and available funds as the key resources to work with while programming major events. The critical evaluation of the 'supply' side, including available venues, parks, transport system, accommodation and public investment was required in order to inventory all the assets and plan the portfolio in accordance to them. In Auckland, the legacy of the 2011 Rugby World Cup resulted in the construction of a series of new facilities and venues (Wynyard Quarter, Viaduct Event Centre) as well as renovation of the existing constructions (Eden Park Stadium). These

development projects provided Auckland with the strategic assets that showcased it as a desirable event city. Wellingtonian event planners expressed similar meanings regarding the importance of event facilities:

We have good sporting venues, we have good training facilities, we have good theatre, rehearsal space, and that kind of ad-hoc programmes, extra support that would enhance someone's experience while they are here (W2).

Dunedin positioned itself as the only sport destination in New Zealand that had a roofed stadium. This infrastructural asset gave a solid point of difference to the city. The covered stadium was able to host different sporting, cultural events, concerts and other entertainment all year round. In 2013, the renovated Town Hall was opened in the city. The venue was redesigned particularly for hosting large business events.

It was equally important to realise the limits of the available facilities in order to not overestimate the city's capability:

I think we need to be cognizant of our infrastructure and what we can achieve within our infrastructure. That is not necessarily a challenge so much as a reality is being aware of the things that we can do well in the environment that we operate in rather than trying to target something that is not particularly attainable" (A1).

"We are limited with the venues and that does require us to think creatively about alternatively ways of delivering things (W1).

In Dunedin, the interviewees indicated the lack of accommodation as one of the key obstacles on the way to attract and host large-scale events in the city.

The availability of sufficient funds affected the decision-making and event selection processes in the cities under study and determined the number and scale of events in the portfolio. Interviewee A1 argued:

Obviously, the other factor is the budget we may have available... It can be that the events that we have already bid for or invested in in a future year then impact on what is the rest of portfolio is like. For example, we have, these three one-off events that we have coming up in the next twelve months that... they are extremely significant in their size and scale but also in their investment required. We have limited investment for other events in this case (A1).

Event planners in Wellington also emphasised a direct dependency of event programming and availability of funds. They argued that limited funding for major events was a

negative factor that “inhibit us from investment opportunities that might come up and that are very good for the city” (W1). In Dunedin, the on-going reduction of the city events budget limited the event-related opportunities and industry creativity.

5.4.3 Factor 3: Market demand

The analysis revealed the existence of external and internal demand in the cities under study. The internal demand demonstrated the availability of an internal market and audience for a particular event which was to be held in the city. In Auckland, the common strategy was to conduct market research and surveys as a part of the feasibility study to evaluate the perspectives of the proposed event projects.

In Wellington and Dunedin, no evidence of such preliminary research was indicated. However, the community perceptions influenced the Council’s decisions on what events to include into the annual programme of events. For example, in Wellington a biannual Cuba Dupa street festival was resumed and financially supported by WCC in order to meet the expectations of the residents:

A group got together to kind of reinvent it [Cuba Dupa] in a whole new way...That is where kind of seed funding comes into play to help this event to grow sustainably rather than not (W2).

The analysis of the internal situation on the event market made it possible to identify current gaps in the portfolio planning. In Auckland, the demand analysis led to the identification of specific shortfalls in terms of economic growth, tourism development and community development. The next step was to find or create an event or a series of events that could deliver positive outcomes and decline the influence of those gaps. The event strategy in Wellington was directed towards profiling the city as a capital of creative industry. Dunedin planned to recreate the city’s heritage festival and make it more oriented on the city history and architecture.

The external demand occurred when an external market player, like an international sporting federation, was interested in hosting its event in New Zealand in order to increase its awareness or to retain its position in this geographic region:

In the sporting world sometimes there are things that can have an influence on us. For example, for an event, for a discipline to be included in the Olympics it needs to have...to be equal gender and the global event. That is one of the things IOC looks for. So an event that only played in Russia and nowhere else is not going to be in the Olympics. It needs some sort of global awareness.

Obviously, every event wants to be in the Olympic, every sport wants to be in the Olympics because that is a profile growth, commercial opportunity... Sometimes we might have an international federation that might recognise that they need to approve their profile presence in our part of the world to help to either retain their position in the Olympics or to gain their position... (A2).

This was a chance for the city to capitalise on this external opportunity, host the event and thereby enhance its international profile and competitive identity as a major events destination.

5.4.4 Factor 4: Industry capability

A factor of industry capability was critically important to Auckland. It reflected the managerial and organisational expertise in planning and delivering a portfolio of major events. As interviewee A3 noted:

You need to have enough people who can actually deliver events that you want to have. Your event portfolio can only be what those people can deliver (A3).

The growing experience of the city in planning and management of large-scale events increased the level of managers' and the whole industry's capability to organise and host events of international and national significance. This also referred to a strategic use of volunteers' pools and sharing of knowledge among the local and regional event sectors. As interviewee A2 mentioned, in order to maintain and enhance the level of capability with regard to organising major events in Auckland, ATEED ran so-called 'observers programmes', when event organisers from around the country were invited to 'get behind the scenes' (A2), to explore the volunteer management, discover media and operation centres, meet ATEED's events team and discuss their current challenges.

Wellingtonian city event managers viewed the industry capability in terms of learning and knowledge accumulating. Interviewee W2 argued that "we are learning a lot from our events and particularly the ones that have a strong volunteer or small paid roles..." (W2). The example is a small community event, Newtown Festival, which utilised a well-developed and innovative waste management system. The intention of the City Council was to implement this system in other community and major events. The accumulation of such expertise made it possible to benchmark events and improve the whole organisational process.

In Dunedin, the factor of industry capability was described in terms of stakeholders' mobility and community expertise. Stakeholders' mobility manifested itself in the ability of different stakeholders to cooperate productively, while facilitating the organisation of events:

Come to Dunedin with your event and the entire city will get behind you. The city is small enough to engage the whole city, the schools get involved, the university gets involved... We have mechanisms to do that (D2).

The community's expertise in organising events was named as one of the key factors that determined a success of several large city events, like the Port Chalmers Seafood Festival and the Midwinter Carnival. The community played the central role in concept development and planning these events through a voluntary created network of organisations and individuals that brought together their resources and experience.

To sum up, the analysis of the theme 'Critical design factors' demonstrated the importance of various factors that influence planning and development of portfolios of major events in the three cities. Event planners in the cities took into consideration an interplay of seasonality challenges, geographical location, available local resources, market demand and overall industry capability in order to adjust their portfolios to the current conditions and circumstances.

5.5 Emerged theme: Portfolio integrity

The theme 'Portfolio integrity' analyses the development of integral relationships between events in a portfolio as well as between a portfolio and a host city. The following sub-themes reflect the main aspects of integrity: 'Portfolio balance', 'Event scheduling' and 'Leveraging of events'. 'Portfolio balance' explores diverse meanings of balance in the portfolios in Auckland, Wellington and Dunedin. 'Event scheduling' analyses the tactics that were applied by city event planners in order to control the distribution of events within a calendar, as well as packaging and cross-promotion of events. Finally, the sub-theme 'Leveraging of events' explores the development of event-themed leveraging and legacy projects in the cities.

5.5.1 Sub-theme: Portfolio balance

The interviewees in all three cities stressed the idea of balance as a cornerstone of portfolio integral value. Due to the contextual peculiarities, the concept of balance was described differently, attaching distinct meanings and characteristics. Portfolio balance in Auckland referred to the correlation between selected events and associated outcomes. The decisions regarding the extent of sponsorship or investment depended on the estimated performance indicators and specified conditions, which derived from a feasibility study of a particular event. The outcomes-driven approach that guided the portfolio design was agnostic to the genre balance of events. The balance in the portfolio was achieved by the allocation of specified roles an event could play in order to achieve specific outcomes. Some events, generally cultural celebrations, provided liveability, others, for example, sporting events, economic benefits and international exposure. Interviewee A2 argued:

I mean, if you think in terms of our liveability outcomes and participants and spectators in events, it is the non-sporting events, specifically Lantern, Diwali. They drive most of our outcomes. So, those are non-sporting events. In terms of our international profile, it is primarily the sporting events that help us to achieve those. I think we have got a pretty good split but again, remembering that underneath our strategy our portfolio is not about what put into it in terms of type of events. It is about what comes out in terms of outcomes (A2).

The portfolio balance in Wellington was described as a balance between genres, target audience and events accessibility. This meaning of balance reflected the applied ‘delivering of fundamentals’ approach, where portfolio was viewed as a composition of events of different genres. Interviewee W1 explained that city event planners tried to achieve a “balanced representation of different entertainment levels that people want to see” within the portfolio of major events. One of the critical components of a balanced portfolio design was event accessibility. The portfolio should contain free city events that deliver a sense of festivity to all the residents and visitors. However, some events were more commercially oriented. In this case, the task of the city events team was to monitor the level of fees and negotiate ticket price scale. Overall, the key message that event planners in Wellington wanted to deliver with regard to a portfolio balance was: “There is something on for everybody” (W2).

In Dunedin, the same genre-oriented and audience-oriented matrix was identified. Although, as mentioned previously, the portfolio of events in the city was viewed more

as a generic list of events, interviewees D1 and D2 emphasised the existence of a good balance of event genres and accessibility.

5.5.2 Sub-theme: Event scheduling

The compositional unity of the portfolio of events provides event planners with an opportunity to intervene and manipulate the event calendar in the city. This strategy allows city events teams to control major events scheduling, to bundle or package events with one another with tourist attractions and to cross-promote events within the portfolio. In 2014, in Auckland, several events of different genres were organised and hosted within one weekend in order to increase the ‘buzz’ effect, attract a huge audience and deliver a nation-wide promotion campaign:

So, what we are seeing now is the close working together of events. ATEED for example, last year, packaged three events together, the Nines [NRL Auckland Nines], Eminem concert and Lantern Festival. They packaged them together and made a weekend not to miss kind of thing. It was promoted nationally. As the city becomes more experienced, it tends to bring events together. They complement each other, promote each other (A4).

In Wellington, the same tactic was used when two very different events, the Lux Arts Light Festival and Visa Wellington on Plate food festival were organised on the same day:

Two independent genres, one being a food festival, the other being an arts light festival, and they did benefit each other, leveraging each other audiences, co-promoted each other, selling a more holistic experience of coming and having a really nice meal in the city and see some beautiful art work in night, or alternatively come and see some beautiful art works in night and get a good meal in the city. That was a very good partnership (W1).

Events can be also blended in a single package. For example, a kids’ triathlon competition was included into the Cuba Dupa street festival in order to attract more families:

Kids can bring mum and dad to support them. And this event finished at midday on Saturday. And Cuba Dupa continues till midnight. There are a lot of opportunities to leverage the audience. Look, after you finish there, why not to bring your kids to Cuba Dupa (W2).

Event planners in Dunedin also tried to package events in order to increase attendance and the diversity of programme offerings. In 2014, a new event, Vogel St Street Party

was implemented into the annual programme of the local Arts Festival. That was a ‘win-win’ decision. The street arts party was cross-promoted with the main festival. It resulted in big numbers of participants and spectators. Arts Festival, in turn, enriched its programme.

Such tactics of event packaging or bundling differ from adding elements to events, which was described in Chapter 4 (Sub-section 4.4.2) with regard to the Wellingtonian portfolio approach. The idea here was not to add new elements to the main event programme, but to unite independent event organisers in their attempt to deliver successful and profitable events:

If you are hosting, for example, a world triathlon event, there is an opportunity also to have a big triathlon annual general meeting or conference. You can organise business events during those sporting events as well. So there is kind of synergy between the two (A4).

Sometimes, event planners were not capable of manipulating the event dates. It was usually the case of large-scale international events with strictly defined scheduling:

There are some things we cannot shift. Take World Cups as an example. We are committed to delivering our share of events on the dates that are set by them. Often that would be a starting point and then we look at how we shuffle things in around that to balance the portfolio. We will have 4 matches. It was very challenging to deal with other events on the same dates. We have had hard conversations with event organisers sometimes when we know that the things are not going to work but that is a part of our role to help, facilitate dates and event programme that is going to benefit them as much as it going to benefit the city (W1).

In such situations, event planners tried to intervene in the programme of the main one-off event and supplement it with already existing or new local events and celebrations, as it was in Dunedin when special events were produced for the representatives of cultures whose teams played in the city during the 2015 ICC Cricket World Cup.

5.5.3 Sub-theme: Leveraging of events

Portfolio strategic value manifests itself in the event leveraging activities. In Auckland, major events were viewed as an important source for delivering and maximising benefits that were not directly related to their staging: “I think the event itself can only do so much if you don’t actually leverage this event to achieve other outcomes. Events is a platform to achieve” (A3). Programming of an event portfolio places leveraging on a more holistic

and strategic basis. Indeed, it is more beneficial to develop and accumulate all the leveraging strategies within one entity rather than estimating and planning for discrete events. Portfolio approach allows looking beyond direct events impacts:

I think that is something that we will do more and more in the coming years: develop programmes even around small investments and look outside of the footprint of an event itself to see how we can derive some benefits for the other 51 weeks of the year (A1).

ATEED tried to implement a leveraging programme for every significant event in the portfolio. Some strategies included the use of an event in the city's promotion campaign: "If an event has a potential to deliver a good international exposure we will spend our leverage money on producing of good content. We use athletes who come here in destination marketing purposes" (A3). Other plans focused on the amplification of visitation and support of the local hospitality industry. Leveraging synergy of the event portfolio increased the city's ability to plan for improvements in other industries and sectors. In this case, events play a role of contributors of solving social or economic issues:

For example, we know that in Auckland youth unemployment is a real issue. Skill shortfall for business is a real issue. They are not events issues. That is not something an event is going to solve. But we might be able to build an event that provides a platform for...that can help to address that issue for example. Let's start from that as our first point and then see what we can do to help to achieve that outcome (A2).

Event planners in Wellington positioned themselves as partners with hosted events. They supported events and expected events to contribute to the city prosperity:

We want to be helping grow the events for themselves but also want those events to help our city. We are looking at how to leverage the content of the event to bring benefits to the city (W1).

Event leveraging in Wellington was largely concentrated around large-scale national bids, such as the 2015 ICC Cricket World Cup and the 2015 FIFA U-20 World Cup, where the New Zealand Government was also involved in decision-making. The interviewees sometimes interchangeably used the terms 'leveraging' and 'legacy'. Speaking about leveraging strategies for the 2011 Rugby World Cup, interviewee W1 mentioned that one of the results of the leveraging programme was the establishment of a well-trained and motivated pool of volunteers. That legacy has been used since 2011 in a number of other large city event projects. Interviewee W2 noted that sometimes long-term leveraging

benefits could be achieved even in small community events. Positive results, like well-developed waste management, can be implemented while planning future major events. To sum up, leveraging value of events in the Wellington's portfolio was confirmed by the interviewees. However, the scale of leveraging strategies in the city was less shaped and strategically oriented in comparison to Auckland.

Dunedin event planners argued that major event leveraging was an undeveloped area of event programming in the city. Although they acknowledged the importance of event leveraging and legacy, no concrete examples of such plans were provided. Often, discussing leveraging, the interviewees referred to the creation of some pieces of street art around the city, fan-zones and some short-lasting tourist activities. The leveraging potential of event portfolio was not estimated and strategically used. Interviewee D1 emphasised the necessity of regular council meetings to discuss and plan activities outside events delivery, which could contribute to the promotion of the city and its heritage.

Overall, the development of portfolio integrity entails the identification and cultivation of key principles that harmonise the relationships between events. From the perspective of city event planners, these synergetic values allowed a proactive planning and utilisation of the portfolio potential.

5.6 Summary of the chapter

The data analysis in this chapter outlined an interplay of several themes that explain a multi-dimensional structure of event portfolio programming in Auckland, Wellington and Dunedin. Thus, the analysis indicated the existence of underlying layers that influenced the design and utilisation of portfolios. City event planners were actively engaged in constructing a desirable identity, using major events as key contributors to place uniqueness and city eventalisation. Portfolio assembling strategies defined the ways major events could be included into event portfolios.

In all three cities, the following tactics were applied: owning of events, sponsoring and bidding for events, building new and growing existing events. The preferences of one or another method varied. Auckland actively utilised bidding and sponsoring strategies. As a result of the aggressive investment campaign, Auckland's portfolio of major events was over-supplied by one-off sporting major events. Wellington and Dunedin were more oriented on growing and owning of events. The financial opportunities and availability of relevant resources significantly influenced the utilisation of portfolio assembling strategies.

Portfolio design factors can significantly influence the compositional structure of the portfolio as well as planning and delivery of major events. The interplay of such factors as seasonality, geographical location, local resources, and market demand and industry capability significantly affected the design process on all three analysed cases. Each of the factors requires a profound analysis and evaluation in order to minimise their possible negative impacts and maximise the positive ones.

One of the key aspects of portfolio design was its integrity value, which included its balance, event planners' ability to manipulate the schedule of events, and leveraging opportunities. In all three cities, balance was identified as a key strategic asset of portfolio programming. Different views on the meaning of balance in Auckland, Wellington and Dunedin correlated with the portfolio approaches applied in the cities. In Auckland, portfolio was balanced through delivering stated outcomes. In Wellington and Dunedin, portfolio balance was evaluated on the basis of genre representation. The ability to manipulate the portfolio scheduling in order to achieve better outcomes was also named as an important strategic feature of portfolios.

Leveraging of events from a portfolio was another critical aspect of portfolio programming in the studied cities. Leveraging provides an opportunity to synergise events in the portfolio with other city-planned activities that could occur as a result of staging a major event. However, as the analysis indicated, only Auckland applied such activities on a permanent strategic basis. Although event planners in Wellington and Dunedin also admitted a necessity of such endeavours, the leveraging potential of portfolios was underexplored in these cities.

The next chapter will present a discussion of the research findings. The themes, which were analysed in Chapters 4 and 5, provided conditions for creation of a theoretical model that explains the complex process of event portfolio design in three studied cases. The chapter will accumulate all the key findings of the research, discuss a constructed model and provide considerations for its applicability in Auckland, Wellington and Dunedin.

Chapter 6: Key processes of event portfolio design

6.1 Introduction

This chapter discusses the key findings of the research which emerged from the analysis of cross-cutting themes in previous chapters. Chapter 4 explored the nature of the portfolio approaches to major events in the studied cases. Data analysis emphasised a critical role of local institutional structures and event policy frameworks in developing an outcomes-driven approach in Auckland, ‘diverse minimum’ strategy in Wellington and ‘simplistic programming’ of events in Dunedin. Chapter 5 explored various aspects of the portfolio programming. The results of the thematic analysis demonstrated that portfolio design in the cities was a multifaceted process. It entailed underlying layers which explained portfolio rationale, assembling strategies to include events into the portfolio, local factors that affected the design and overall portfolio integrity, which was explained in terms of balance, event scheduling and leveraging.

In order to cover and discuss all the important dimensions of event portfolio planning and development discovered in this thesis, the chapter starts by revisiting and elaborating Ziakas’ (2014) portfolio design model. Key components of the revisited model are described. The second part of the chapter focuses on the discussion of the four constructs from the model which shape and guide the portfolio design in the three cities. These are Imagineering, Approaching, Composing and Synergising. The constructs were informed by the analysed themes in Chapters 4 and 5. The final part of the chapter summarises the discussion and sets the ground for the applicability of the discussed model in different contexts. The discussion in this chapter interweaves the results of the research and literature in order to present an original, destination-specific perspective on event portfolio design.

6.2 Towards a new event portfolio design model

Design of event portfolios can be seen as part of the destination’s system as a whole. Not only events are influenced by the local settings, the host place is also influenced by the way events are planned and developed (Richards, Marques, et al., 2014c, p. 557). Richards, Marques, et al. (2014a, p. 205) argue that, from the perspective of urban destinations, it is important to consider “not just what events currently fit with the aims and objectives of the city, but also what trajectory the city wants to create towards the future”.

The theoretical model of event portfolio design, presented in Figure 6.1, was influenced by Ziakas' (2014) exploration of event portfolio design. The central question for Ziakas concerns the compositional structure of event portfolio. The author argues, "The nature, character, and its [portfolio] context are determined primarily by the events included in the portfolio" (Ziakas, 2014, p.163). Ziakas's (2014) model (Chapter 2, Figure 2.1) entails factors, decisions, event strategies and event characteristics. Being a fundamental step in event portfolio theory development, the model concentrates on what events to include in the portfolio and their strategic characteristics. What remains outside of the scope, is how exactly to proceed with the design of an event portfolio, what contextual peculiarities to consider while programming events, and what strategies should be used to select, manage and synergise events within portfolio. The theoretical model suggested in this research addresses these questions.

The creation of the event portfolio design model was enabled by the implementation of a three-phase thematic analysis, which included familiarising with the data, generating codes and themes, and reviewing themes. A two-cycle coding process was utilised, including initial, more descriptive coding, and pattern coding, which identified explanatory themes and constructs. The model of event portfolio design is based on the relationship of four constructs: 'Imagineering', 'Approaching', 'Composing' and 'Synergising'. Each of the constructs is broken down further into several components. For example, the 'Imagineering' construct consists of 'Competitive advantages', 'Comparative advantages', 'Internal values' and 'Place experience'. Each of the constructs and their components will be discussed further in this chapter.

In order to discuss the model in detail, the first construct, 'Imagineering', is positioned at the top as it is responsible for vision and rationale creation to plan and develop portfolios of major events. The creation of this construct was informed by the analysis of the underlying layers of portfolio programming in the cities under study. The theme 'Constructing desirability through hosting major events', discussed in Chapter 5, provided a solid basis for the discussion of this construct and explained the grounded logic of portfolio planning in the cities. Large-scale events were expected to enhance the desirability and attractiveness of the host places as well as contribute to the overall city prosperity and community satisfaction. On a conceptual level Imagineering, as a process, is grounded in the *competitive advantages*, *comparative advantages* and *internal values of the cities*. An interplay of these components determines formulation of the vision, goals and objectives for major events, which are directed towards delivering an authentic city experience.

The second construct, 'Approaching', is positioned at the bottom of the model as it determines the implementation of portfolio strategies and reflects the contextual background in the cities. 'Approaching' guides the decision-making process, when event portfolio strategies are developed and implemented. The parameters of this construct were generated by the analysis of the applied portfolio approaches in Chapter 4, including the outcomes-driven approach in Auckland, 'diverse minimum' approach in Wellington and 'simplistic programming' in Dunedin. To discuss the comparative values of Approaching the researcher applied a 'linear continuum of characteristics with opposing values at its ends', suggested by Ziakas (2014, p. 166). Two parameters were adopted directly from this method: Formality and Intentionality. Others, for example, Replicability, Connectedness and Polysemy were not applied, as they did not entirely fit the discussion. Instead, Directionality and Rhythmicity were proposed.

Formality refers to the level of standardisation of portfolios, operating procedures, protocols and rules. The opposing values of formality are 'standardised' and 'amorphous' (Ziakas, 2014). *Intentionality* determines to what extent portfolio approaches and initiatives in the cities under study are strategic and intended to achieve certain outcomes. The opposing values are 'purposive' and 'unintended' (Ziakas, 2014). *Directionality* describes the orientation of the approaches, either on the supply-side market-led initiatives or demand-side community engagement in portfolio design. *Rhythmicity* refers to the ability of city events planners to modify their approaching due to the context changes and revision of objectives, with values being 'intensive' and 'passive'. Overall, the Approaching part of the model represents a 'built-in equaliser', which can be used to balance the opposing values of the parameters and adjust the utilised approaches with the current city objectives.

'Composing' and 'Synergising' constructs are placed in the middle of the model as they directly guide the inclusion of events and development of portfolio synergy. The 'Composing' construct focuses on the development of portfolio compositional structure, including strategies, event roles and design factors. The construct was informed by the themes discussed in Chapter 5, namely 'Portfolio assembling strategies' and 'Critical design factors'. The 'Event roles' component was informed by both the data and the literature.

'Composing' includes a set of strategies that are divided into community-oriented and market-oriented. *Community-oriented strategies*, including *Owning, Growing and Creating*, allow city event planners to deliver major events that possess characteristics of

sustainability, authenticity and identity. Owning of events provides the city with the control over an event's rights and properties. The permanent character of an owned event offers long-term positive outcomes. Creating and growing events provide cities with a pool of home-grown, distinctive events that are deeply embedded into the community life. Such events usually play a role of anchors that attract visitors and guarantee lasting attention to the destination. *Market-oriented strategies*, such as *Sponsoring and Bidding* are oriented on delivering specific outcomes, and usually the success of such events is measured in tourist numbers and visitor nights. Sponsoring of events allows contracting of specific conditions, as well as good opportunities to return investment funds. Bidding on one-off major events provides a host city with an opportunity to enhance its international profile and gain positive economic and image outcomes.

Implementation of different composing strategies affect the roles that major events can play within a portfolio. The researcher did not construct any specific theme to analyse *event roles*. The roles of events from portfolios were incorporated and analysed within different themes, including 'Event policy framework' in Chapter 4, 'Constructing desirability through major events' and 'Assembling strategies' in Chapter 5. The evidence from the data confirmed the existence of the following *functional roles*: *Image-maker*, *Core attraction*, *Focal celebration* and *Catalyst* (Getz, 2013; Ziakas, 2014). Events as image-makers contribute to the development of the city brand. Core attractions serve as a vehicle for visitor economy development. 'Anchored' events, which are deeply rooted in the community, play a role of Focal celebrations that develop and strengthen a sense of belonging and community pride. Some major events catalyse the development or regeneration of city spaces, making them liveable and attractive. Moreover, event roles can be distinguished by their impact on the community and city structures and interactions. Two *qualitative roles* of events were adopted from the literature in order to expand the discussion. Thus, *Pulsar* events provide a sense of change, when new connections are established, new infrastructure is designed and place image is promoted, whereas *Iterative* events strengthen internal community networks and relationships (Richards, 2015b).

Design factors should always be taken into consideration while planning a portfolio of events, as they can significantly influence the nature and practicability of the portfolio. Data analysis in Chapter 5 emphasised four key factors, including geographical location and seasonality, local resources, market demand and industry capability. The factor of

geographical location and seasonality determines the feasibility of planning and organising events within particular geographic areas and under seasonal weather conditions. *Local resources* are unique capitals of the host destination that can support the organisation of events, including funds availability and infrastructure (Ziakas, 2014). *Market demand* refers to the level of potential markets for an event and targeted audience (Ziakas, 2014). *Industry capability* can be described as a managerial and organisational expertise and strategic networking. The factors of Competition and Contingency, identified in Ziakas' model (Figure 2.1), were not identified as critical factors in this research.

While Composing produces 'flesh and bone' of a portfolio, Synergising determines the mechanic of relationships between events in the portfolio, as well as portfolio harmony with other related assets and objectives in the cities. This construct was informed by the themes discussed in Chapter 5: 'Portfolio balance', 'Event scheduling' and 'Event leveraging'. *Portfolio balance* refers to the equilibrium between planned expectations and achieved results. It can be outcome-oriented, genre-oriented or audience-oriented. *Scheduling* provides a strategic variant of intervention into the major events sphere to control portfolio programme, packaging, co-marketing and cross-promotion of events. *Leveraging* deals with the ability of event planners to use major events in order to achieve other positive results which are not directly connected to the event itself. Strategic decisions on event reach, frequency, size, placement and fit, emphasised by Ziakas (Figure 2.1) were not specified in this model. They are equally important for both Composing and Synergising and were generally addressed while discussing these processes. For example, Composing entails decisions on the reach of events or what audience to target. It also controls the number of events in the portfolios. Synergising deals with event frequency, calendar placement and overall fit or integrity of events within the portfolios. The following sections will critically discuss the elements of the model. Four constructs will be discussed in the order they were presented in this section.

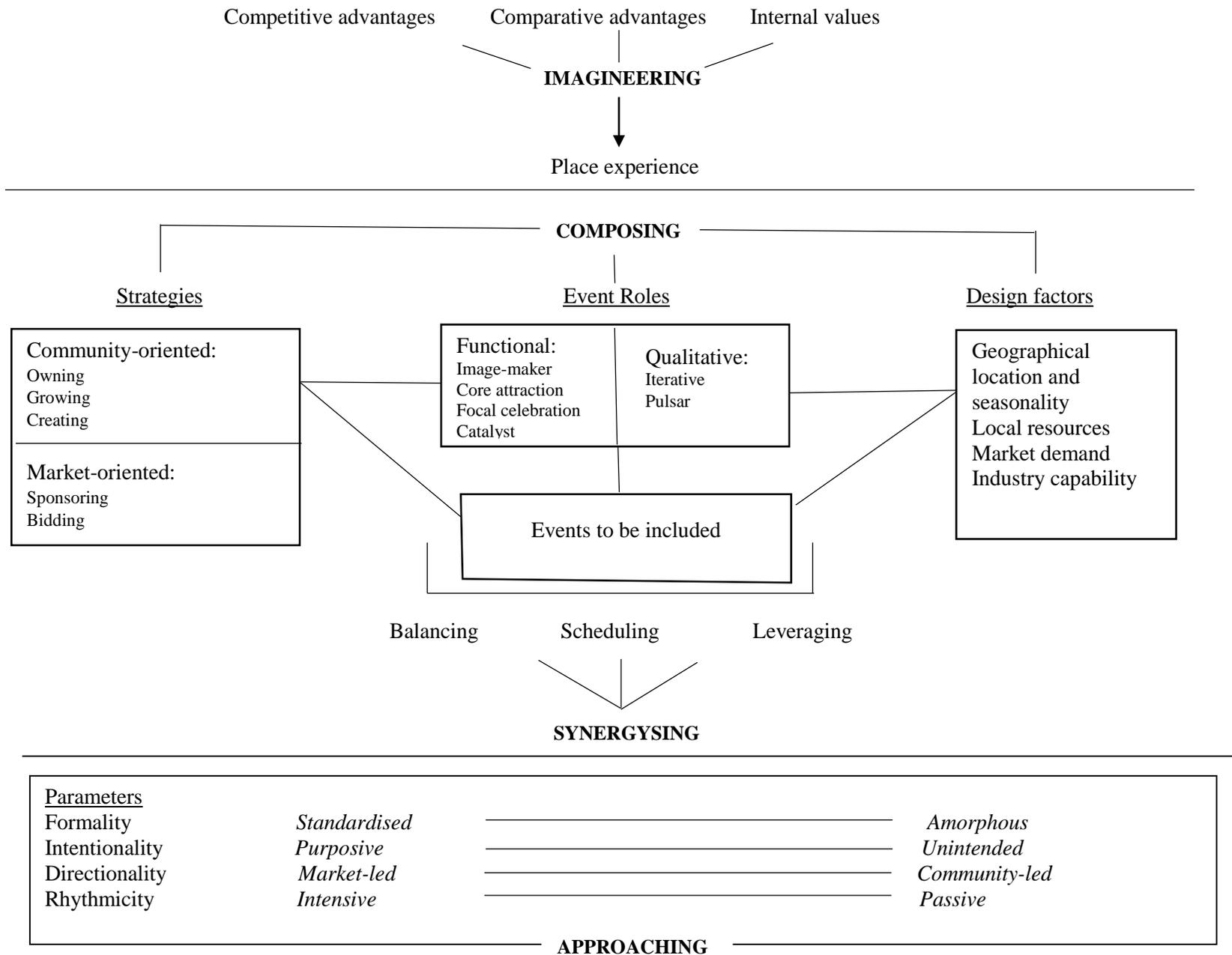


FIGURE 6. 1: EVENT PORTFOLIO DESIGN

6.3 Emerged construct: Imagineering

This section discusses Imagineering, the first construct in the suggested portfolio design model. Imagineering explains the underlying layers of portfolio approaches to major events in the cities under study. Although the concept of Imagineering has been discussed recently in event studies (e.g., Ouwens, 2014), it has not yet been applied in the event portfolio context. It is believed that the term ‘Imagineering’ was coined by Walt Disney and referred to the creation of new experience (Kuiper & Smit, 2014). The concept was applied to the design of Disney parks and development of particular experience-oriented activities in these theme locations (Richards, Marques, et al., 2014c). Later on, the concept has been used in a variety of disciplines, including marketing, destination brand promotion and event management.

Thematic analysis in Chapter 5 indicated that major events were seen as a significant part of place-making strategies in the selected cities. In all three cases, the rationale for hosting major events and realisation of related initiatives correlated with the aim to achieve desirable city profiles within tourist, economic, and social-cultural domains. Major events were viewed as strategic instruments to construct and further develop the cities’ uniqueness and attractiveness as major event destinations, as well as desirable places for living, working and doing business. The role of Imagineering is to provide visioning, which is a process of “identifying elements of a desired future” (Getz, 2013, p. 91). Such elements may correlate with sustainability, liveability and visitability. All three ideas reflect a city’s desire to fit in particular domains. Sustainability refers to the long-term development of a place. Liveability, in its diverse manifestations of social and environmental elements, covers contemporary perceptions and demands of cities (Ruth & Franklin, 2014). Visitability is described as a production of visitor-friendliness, including usage of culture, arts and urban design (Dicks, 2003).

Imagineering reflects the comparative, competitive advantages and internal values of the place and establishes an inspirational desirable image of a city. *Comparative advantages* usually pertain to a destination legacy, heritage, or related available resources. These include location, climate, visitor attractions, social and economic conditions (Getz, 2013). Data analysis in Chapter 5 confirmed that city event planners in Auckland, Wellington and Dunedin attribute importance to the advantages of their geographical location, diverse collection of natural attractions and friendly and hospitable urban atmosphere. Auckland, for example, positions itself as ‘a city of dualities’, where surf beaches and vibrant urban areas complement one another. Wellington emphasises its small town charm, where all

the city essentials are compactly located and are easy to access. Dunedin plays with its cultural legacy, heritage and surrounding wildlife.

Competitive advantages refer to the activities and achievements that improve the profile of a city and emphasise its points of difference. This includes an effort to develop relevant strategies, establish regional development agencies, partnerships, effective marketing and industry competence (Getz, 2013). Anholt (2007) argues that building a competitive identity of a place requires a joint strategy of highlighting and promoting the things that a destination has or does, including its people, traditions, attractions, companies, products and services. Major events in this case play a role of reputational assets that attract international and national attention and influence the formation of positive stereotypes and place images. The interviewees in all three cities emphasised the importance of events in promoting cities' values, distinctiveness and vibrancy. Major events are capable of bringing new 'rhythm' to city streets. They increase the buzz-effect and deliver a whole city experience, sharing the city flavour with visitors and local residents.

Internal values manifest themselves in the community's culture, history and beliefs. This is an inner mentality of the population projected through the creation of shared meanings. A city's residents will never know most of their neighbours; however, in their minds lives the image of the communion (Anderson, 1991). In Chapter 5, internal values were described in terms of cultural and ethnic diversity, community vibrancy, historical roots and heritage that are transmitted through events and, again, outline place uniqueness. Imagineering synthesises major events with the internal values of a place. Events become vital particles of a city's existence. They influence the formation of the city character and transform the way people perceive it.

As a creative concept, Imagineering ties in with the premises of the experience economy where business (cities) must design memorable experiences for consumers (visitors and residents) in order to promote and sell their goods and services, for example, tourist attractions, lifestyle and investment opportunities (Pine & Gilmore, 1999). Imagineering constructs a different type of lived reality, filling it with 'imaginative' geographies, including theme parks, creative arts districts, waterfronts and other leisure environments that produce city event-scapes (Archer, 1997, p. 326). This research demonstrated that event planners visualised the cities as permanent event stages, where an array of different events is held in an attempt to create a feel-good unique experience of the city in the minds of event visitors and participants (Richards, 2015a).

Place experiences are usually about people's interaction with the physical, virtual and social environment of cities. Place experiencing stimulates imagery processing, gives meaning and generates emotions (Govers & Go, 2009). The creation of meaningful experience through major events employs a story-telling principle. An event audience is not merely interested in buying a final product, an event, but also in buying real or fictional stories behind it (Mossberg, 2007). Some events are very good in this story-telling component. For example, in Auckland, the Pasifika Festival emphasises the Polynesian context and the cultural diversity of the largest city in New Zealand. Cuba Dupa street festival in Wellington tells the story of a creative city community, street art and city vibrancy. Midwinter Carnival in Dunedin provides visitors with an authentic experience of celebrating long winter nights and a 'polar city soul' that is determined by the geographical location of the city. A symbiosis of major events and city images generates an attractive aura of eventfulness (Bevolo, 2014). The development of story-telling themes leads to the creation of an event's vernacular authenticity, when an event establishes strong connections at a local level and visualises specific socio-cultural values of the local community (Bevolo, 2014).

Imagineering represents the initial stage of the portfolio design. This process determines the exceptional function of events in the construction of a city identity. Imagineering guides vision and goal statement with regard to staging major events. The cross-cutting principle that has emerged in the research is the interconnectedness between Imagineering and realisation of major events strategies. The central role in this process is set aside for the development of a portfolio approach that links supply and demand in the public event sphere and determines the nature of event portfolios in Auckland, Wellington and Dunedin.

6.4 Emerged construct: Approaching

The construct of Approaching emerged in order to describe and explain the decision-making process that determines the nature and variations of the applied portfolio strategies in the cities under study. The diversity of approaches in Auckland, Wellington and Dunedin was governed by distinctive local economic, social and cultural contexts, as well as by the applied event policy frameworks and institutional arrangements analysed in Chapter 4. The spectrum of approaches included a strategic outcomes-driven way of event programming in Auckland, a 'diverse minimum' approach in Wellington, when city event planners try to balance limited funds and diversity of events, and a 'simplistic programming' of events in Dunedin. Approaching can be discussed within the spectrum

of parameters. The following sub-sections present a discussion of each of the identified parameters in the three cities.

6.4.1 Parameter 1. Formality: from standardised to amorphous

Data analysis emphasised the existence of the opposing values of this parameter in Auckland and Dunedin, while Wellington demonstrated a degree of fluctuation on the continuum. The process of formalisation of the approach in the city was still under development and adjustment.

Portfolio approaching in Auckland was found to be a highly formalised process. The event portfolio was viewed as a strategic grouping of events, where each event was expected to deliver certain outcomes and contribute to the overall purpose of the portfolio. A developed event policy framework in the city, which included city policies, strategies and protocols, provided event planners with a standardised toolkit for creating, managing and evaluating the portfolio. The evidence from this case supports Ziakas' (2014) argument that established policies and written rules facilitate the efficient operation and coordination of the event portfolio. The negative side of the formalisation is the loss of creativity and authentic character in the portfolio (Ziakas, 2014). Indeed, the strategic nature of Auckland's approach primarily manifested in an aggressive bidding and staging of one-off events that brought new visitors and economic benefits but did not reflect any local authentic meanings and traditions. Getz (2013) argues that such a type is characterised by the possibilities of high rewards and high risks. Solid investments in one-time events are usually coupled with uncertainty about their short-term results and long-term legacies. High formality transforms the event portfolio into an investment mixture where a positive ROI is the only acceptable and desirable objective. To balance the level of formality, Auckland event planners need to concentrate efforts on the development of various criteria of portfolio success and allow the portfolio to be more flexible and spontaneous by targeting a diverse spectre of social and cultural outcomes.

A 'diverse minimum' approach in Wellington guaranteed the development and hosting of a basic number of major events that showcase Wellington as a cosmopolitan, creative and artistic city. The portfolio in Wellington was defined as a collection of events of different genres and for various target audiences. Although the level of formality in this case was not as strong as in Auckland, the available written protocols, funding rules and general events policy provided sufficient regulatory standards to run the approach. The spontaneity, creativity and authenticity of the portfolio appeared in the symbiosis of small community, regional and large events that were managed by the same team within the

City Council. The diverse typology of events and general management enabled the city to accomplish strategic objectives both for community satisfaction and overall city development. The changes in the institutional structures and the creation of WREDA could significantly influence the levels of formality towards the standardised Auckland-like end of the linear continuum.

In contrast to Auckland and Wellington, the approach to major events in Dunedin was less formalised. The results from Dunedin's case generally confirmed the findings of previously conducted studies in small urban and rural communities (e.g., Clark & Misener, 2015; Ziakas, 2007). Although Dunedin obtained some elements of the portfolio approach, including visioning events as contributors to the city prosperity, the evidence showed a lack of strategic direction in the city's events industry. The portfolio of major events was considered as a list of recurrent and one-off events without any clear objectives. In order to move towards approach standardisation and balance the level of formality, Dunedin event planners need to formalise the key operating procedures, redevelop currently unclear event evaluation matrices and state concrete achievable outcomes.

6.4.2 Parameter 2. Intentionality: from purposive to unintended

Intentionality represents a level of strategic intention to attain certain outcomes from staging major events and portfolio development. Analysis of the cases revealed the existence of purposive strategy-making in Auckland, maturing variation in Wellington and a less deliberate intentionality in Dunedin.

Auckland's portfolio approach fully met the criteria of a deliberate strategy for immediate maximum tourism and economic gain suggested by Getz (2013). The strategy focused on boosting the marketing of existing events with the highest potential to attract visitors, bidding on events with high short-term positive impact and creation of one or two events for specific target markets. Getz (2013) argues that such a 'blitz' strategy is not able to deliver a sustainable development of a public event sphere; however, it can be employed when a place repositioning or rebranding is required. Auckland's ambitions to become the most liveable city in the world drove city event planners towards a tactic of 'quick wins' in hosting major events.

This type of intentionality has significant limitations that affect the multipurpose functioning of the portfolio. The city event planners were overly focused on the delivery of economic and image outcomes, while community-oriented major events were

downgraded in their importance. The 2015 Pasifika Festival is a good example. The event, which has a 23-year history of celebrating the Pacific Island traditions, music and food was labelled by the participants and attendees as “too commercialised, too regimented and very expensive” (Tapaleao, 2015, March 13).

The portfolio of major events in Auckland was managed by an economic development agency. The nature of ATEED and its profit-making orientation affected the distribution of the city support for major events. A misbalance in the major events purposes toward economic results calls for a revision of the approach and its reorientation on community perceptions and expectations. Attention should be shifted to the support of events that are capable of cultivating authentic meanings and expressions of the community life (Ziakas, 2014). Such events are usually less oriented on visitor numbers and bed nights. Nevertheless, they provide the city with liveability, vibrancy and community satisfaction. Overall, Auckland’s ‘blitz’ approach successfully promoted the city as one of the leading event destinations in Australasia. At the current stage of the event industry development, city event planners should aim to achieve the same profile of the city within the local community.

Recent changes in the institutional structure in Wellington were considered by the interviewees as a key step to a more complex and goal-oriented design and delivery of the portfolio of major events. City event planners in Wellington were leaning towards the development of an Auckland-like portfolio intentionality. Economic and business realities became dominant in the major event public discourse in Wellington. This may cause a change of a vector of portfolio programming and negatively affect a relative balance in the current portfolio.

In order to balance the multipurpose functioning of the portfolio, it might be more beneficial for city event planners to place emphasis not only on the economic parameters of hosting major events, but on the whole value of the event portfolio, including the critical evaluation of the current events in the portfolio, their spread across the year and embeddedness in terms of meeting community perceptions and current city objectives. The model of focused programming suggested by Getz (2013) could serve as a good starting point for the renewed city approach to major events, with the focus on generating competitive city advantages in one or two event themes. For example, an annual culture-focused portfolio of major events could consist of a mix of one-off and recurrent cultural and arts events that fit the identity of the city and enhance its artistic and creative reputation. Ziakas (2014, p. 167) calls for allowing “the generation of the authentic

expressions of community life, which are the lifeblood of events”. Such a sub-specialty of a host city is able to facilitate the achievement of ‘eventfulness’ and authenticity of the overall city event offer.

A simplistic programming of major events in Dunedin was viewed by the interviewees as an ad-hoc approach when event planners tend to do ‘what is easy to do’. A low level of intentionality manifested itself, for example, in the absence of well-planned leveraging and legacy activities in the city. Shortage of available event funds limited the event planners in their desire to fill gaps in the current event programme. Interestingly, limited public resources and a less determined level of intentionality instigated the local community to become a hub for event ideas and creative solutions. The expertise and innovation for events were rooted within the community, however, a lack of strategic vision and absence of clear guidelines did not allow the city to capitalise on this community experience and competence, and the ad-hoc portfolio was unlikely to provide the city with long-term advantages. Development of a sustainable portfolio requires the utilisation of a more complicated process and a more significant level of intentionality.

6.4.3 Parameter 3. Directionality: from market-led to community-led

Directionality characterises a current vector of the decision-making process in the cities. In Auckland, the decisions with regard to major events were in general market-led. Wellington tried to implement a moderate strategy, whereas Dunedin applied a community-oriented approach with a scant strategic regulation.

From the perspective of decision-making and collaboration, Auckland’s approach met the criteria of a corporate, market-led framework. According to Stokes (2008), such strategies focus on the economic impacts of events. Decisions are usually driven by market criteria, including attractiveness, growth and economic resources. Current focus on sporting events and a relatively loyal, in terms of event genres, annual event selection put Auckland into a significant dependence on the external institutions and event rights holders, whose requirements the city had to meet. In a successful effort to secure quick economic benefits and outcomes from hosting major events, Auckland started losing control over the quality of its portfolio, relying heavily on the external event proposals. To improve the situation with decision-making and collaboration a demand-led approach should be applied. The initiative to select and further develop events for the portfolio should come not only from the city event planners, but also from professional organisations associated with certain types of events. For example, local sporting

associations could demonstrate a willingness to attract or bid for a sporting event, and cultural institutions for arts and cultural events.

The portfolio approach in Wellington met the requirements of a synergetic strategy (Stokes, 2008). It was characterised by the utilisation of integrated tactics for new and existing events. Decisions were market- and community-driven, when city event planners weighed up economic benefits alongside social and cultural impacts of events. Wellington's portfolio of major events was more oriented on balancing genres and entertainment levels, rather than on purely investment measures. However, previously discussed changes are likely to affect a balance in the decision-making towards a market orientation for economic and image benefits.

The current event strategy-making in Dunedin to some extent might be labelled using the Stokes (2008) definition of a community, destination-led strategy. The strategy prioritises fostering new and existing city events and festivals, and is characterised by involvement of the community in guiding and influencing the city event strategy. As indicated in the previous sub-section, city event planners viewed the community as a prospective group for new event ideas, innovation and creativity. This is what Ziakas (2014, p. 167) calls "room for innovation and creativity".

The research findings in this case confirmed Stokes' (2008) assumption that collaborative strategy making is relevant in rural or small communities where the process of decision-making is usually driven by available local resources and focused mainly on social, ecological and cultural impacts. However, the current approach to events in Dunedin did not properly connect the city's event-related spheres, for example, city branding, economic development and event industry, and did not provide any clear guidance for event planners. It is possible to conclude that, although Dunedin has been utilising a community-oriented approach to major events, an overarching strategy that connects all the critical elements of the portfolio approach has not yet been created.

6.4.4 Parameter 4. Rhythmicity: from intensive to passive

Rhythmicity evaluates the level of approach renewal during the course of its application – whether it stagnates or becomes innovatively refreshed. Rhythmicity of the outcomes-driven approach in Auckland can be characterised as intensive and innovative, as the city event planners were able to monitor the development of the portfolio and refresh its composition. Around half of the events in the city were selected through an annual contestable process, which guarantees the renewal of the event programme. The city

recognised the strategic necessity of a periodical revision of the approach when new goals are stated and new directions are outlined.

One of the critical factors that determine rhythmicity in Auckland is the achievement of 'critical mass' in the city's major events sphere. Critical mass refers to the minimum number of events and event-related resources required to achieve a self-sustaining portfolio (Getz, 2013). The critical mass in Auckland comprises a basic number of events and event venues, and a guiding event policy framework, as well as collaboration of the key stakeholders, legitimisation, and is reliant on the successful track records of the city on regional, national or international levels and local overall event industry capability. The achievement of critical mass in terms of major events can be seen as a significant milestone in the local event industry development, when an alliance of stakeholder actions, political will, finance and knowledge (Getz, 2013) provide a transformational point for a destination to become an 'eventful city' (Richards & Palmer, 2010).

In Wellington, event planners faced a relative invariability in the portfolio due to having multi-year contracts with event organisers and promoters. This situation, on one hand, simplified the annual process of public investment in major events but, on the other, led to the portfolio containing many events that were organised by virtue of tradition, without any strategic evaluation of their value. A solution for this problem could be found in an 'adding new elements' strategy that was described in Chapter 4 (Section 4.3). Adding new fresh elements to existing major events might be seen as a more sustainable approach to the event planning in the city. Such a strategy would allow the event planners to vitalise their event portfolio's compositional structure with a minimum level of new expenditures and not to supersaturate the major events offered in the city.

In Dunedin, a simplistic composition of the portfolio and a lack of financial resources determined stagnation of the applied portfolio approach. Event planners clearly emphasised the need for strategic changes and a more proactive intervention of the city authorities into the major events field.

Overall, the discussion of Approaching parameters demonstrates that contextual environment in the cities plays a critical role in shaping the portfolio approaches and determining their development and adjustment to current city goals and objectives. Therefore, it is unlikely to highlight a single winning strategy that will successfully balance the opposing values in the suggested linear continuum. From the pragmatist perspective, an amalgam of different approaches is required to provide a deeper insight into the planning and management of portfolios. Approaching affects the planning and

development of event portfolios and their compositional structures. The following section will discuss the components of the Composing construct in Auckland, Wellington and Dunedin.

6.5 Emerged construct: Composing

Portfolio programming is a complicated area of event planning and management. Whitford (2009) argues that it is imperative for cities to identify those events that are most suitable for their profile enrichment and can complement other urban objectives and goals. As a process, Composing includes a set of tactics to construct a competitive and diverse portfolio of major events. It entails strategic decisions with regard to the selection of events, event roles and factors that influence the process. This section starts with the discussion of composing strategies, followed by exploration of event roles. Finally, design factors will be discussed.

6.5.1 Composing strategies

The findings in Chapter 5 delineated five strategies to assembling a portfolio of events in Auckland, Wellington and Dunedin. These strategies are divided into two groups based on the directionality of applied portfolio approaches. Thus, owning, growing and creating consist of a pool of community-oriented strategies, whereas sponsoring and bidding are included into the market-oriented group. Although all of these strategies have been extensively analysed in the literature (eg., Getz, 2013; Richards & Palmer, 2010), there is a strong need to discuss their overall value and contribution to the portfolio design in the studied cities.

6.5.1.1 Community-oriented strategies: owning, growing and creating

The key advantage of *owning* events is that a city controls the event's properties and rights. Such events are "essentially community owned" (Getz, 2013, p. 134). They have stable institutional structures, usually with a board of directors and permanently hired event managers. The direct involvement of local government provides such events with public funding, low rent expenses and free promotion campaigns. The interviewees from Auckland, Wellington and Dunedin argued that such distinctive events should constitute the basis for the portfolio planning. This supports Getz's (2013) theorisation that owned events generate the highest return on investment across many criteria with the minimum of investment. Local major events are fully co-branded with the host place. Their functions include being a visitor attraction, image promotion, delivering community

benefits, including a sense of pride and being sustainable. The support of such events on an annual basis and their inclusion in portfolio guarantees the development of sustainable long-term assets and continuous positive outcomes, for example, permanent jobs. Owned events can become an attractive anchor for other smaller local events that can be bundled together with the main event to increase visitations and a sense of festivity and celebration.

Growing of existing events that are already at a city's disposal is another strategy of composing a portfolio of events. Ziakas (2014a) argues that, in order to compose a successful portfolio, the audit of the whole population of events in a city is required. The obtained data did not indicate any specific methods for identifying such events within the general population of events in the cities. A so-called 'picking the wins' tactic, when promising events were identified and a decision to support and invest was taken, was a general responsibility of all the involved players, including city event teams and other City Council departments. In Chapter 5, several examples were used to demonstrate how former local events were grown to the status of major events. Sometimes this growing occurs in natural conditions without any intervention from the city government, otherwise the event is directly supported by the City Council in order to widen the city's events programme and attract more visitors and participants.

The findings delineated at least three key strategic reasons for *creating* new major events. New events can be developed to fill existing gaps in the annual programme. They can be built in response to market demand and to meet city status requirements. Getz (2013) argues that creation of events is a more sustainable strategy in comparison to, for example, buying events from outside. A locally created event provides city event planners with a strategic advantage in terms of controlling the event-related processes and meeting particular goals when it comes to timing, targeting and a positive city image. In order to succeed, created events should be fully integrated into the community's fabric and city's perceptions. They should possess characteristics of distinctiveness, otherwise, the possibility of a 'copycat' challenge exists. As Richards, Marques, et al. (2014a) argue, there is a current tendency for cities to create events because their competitors have them or because the status of the city allegedly requires such events. This is a risky tactic as if an event is not an integral part of the city, it is unlikely to succeed. For example, in New Zealand, all the cities under study have Fashion Weeks or Festivals in their annual programmes of major event. Because of the oversupply, the 2015 Wellington Fashion Week was cancelled due to insufficient numbers of confirmed designers. On the other hand, Wellington hosts an annual World of WearableArt Show that celebrates theatrical

creativity and extravaganza of the fashion design haute couture. This event distinctively highlights the nature and image of the creative industry in the city.

Identification of a theme for a new event can be a long process that involves different groups of stakeholders and complicated decision-making that considers a wide range of aspects. Auckland event planners recently developed a concept for a new cultural event to showcase the distinctive Maori component of the city. Creation of the concept required consultation with Maori representatives and collaboration between different institutions in the city. In addition, such aspects as marketing, organisation and ownership, as well as sustainability, needed to be taken into consideration.

The element of distinctiveness can be also traced from the processes that occur in a city. For example, in Wellington, the city event planners maximised the city benefits that emerged from the filming of a series of blockbuster movies by creating thematic events such as *The Lord of the Rings* premier or *King Kong* premier. The events were accompanied by other attractions and festivities that targeted a diverse audience and attracted international attention to the city. Dunedin's case demonstrated that sometimes such satellite events become permanent due to the community support. A Port Chalmers Seafood Festival was created as a supporting event for the 2011 Rugby World Cup. It was warmly welcomed by the residents, and, as a result, the festival has become a biannual event in the local portfolio.

Creating and growing events have been considered as a preferable but long and resource-consuming portfolio composing strategies. At the same time, home-grown or created events have a lot of advantages. The rights for home-grown events are usually controlled by the city. Such events are rooted in the community traditions and history, and they are more likely to meet the perception of residents and get their support. What is more important, the home-grown events are an excellent permanent platform for an array of leveraging initiatives and long-term legacy projects.

6.5.1.2 Market-oriented strategies: sponsoring and bidding

The strategy of *sponsoring* major events widens the portfolio horizon in a city, as it provides event organisers and promoters with an opportunity to get some financial support from the city to host their event. Sponsored events are not owned by the city; they should meet key criteria stated by the city authorities in order to get investment and become part of an annual portfolio of major events. Event planners in Auckland, for example, contracted some declared outcomes and conditions. Sponsoring strategy

provides a periodic refresh of the major events offered in event destinations. It is also a good source of support for new creative event ideas and grassroots projects in the city.

Bidding is one of the most popular strategies of securing one-off events for portfolios. Getz (2013) argues that destinations bid for events to achieve clear-cut objectives that cannot be realised in other ways, otherwise, there is no strategic necessity to make huge investment in the bidding process. As the findings indicated, Auckland increasingly used this strategy to secure predominantly sporting events. Such events were expected to bring economic wins and enhance the city's profile. As Foley et al. (2012a) argue, such an approach is common for relatively peripheral event destinations to secure the recognition of the city's brand. The smaller cities, Wellington and Dunedin, did not have sufficient funds to bid on a regular basis and normally they participated in collective national bids to secure the rights to host mega-events such as the 2011 Rugby World Cup.

There are several pitfalls with the bidding element in portfolio design, including the relationships between the host city's brand and the brand requirements of the event owners and sponsors who accompany every important international event. It has already been discussed in this chapter that city event planners very often become dependent on external event-related agencies and, as a result, their organisational creativity is limited. The restrictions that come together with large events may negatively affect local business, community satisfaction and image promotion.

Another issue with the bids is the element of 'unknown'. Bidding on, and then hosting, a large sporting event is an expensive and risky project with some potential of bad legacies. The short-term duration of an event might significantly affect the image and competitiveness of the host destination. Finally, as is evident from the findings, sporting events represent the majority of successful bids in all three cities. As the interviewees pointed out, the main causes of this disproportion was a lack of cultural events on the international bidding market. This is understandable due to the specific character of cultural celebrations and their traditional embeddedness in a community life. It is impossible to bid for the Rio Carnival or Oktoberfest; however, as the example of the European Capitals of Culture project demonstrates, the cultural element in bids is getting more salient (e.g., Richards, Dodd, & Palmer, 2014). For a period of one year, a city-winner organises a series of cultural events and festivals with a strong European orientation. Such events invariably enrich the city's event programming.

One of the solutions for the cities in New Zealand might be a strategy of buying cultural touring exhibitions or travelling art shows. Although there is a huge gap in investigating

the potential of such events for host destinations, the available evidence demonstrates that some touring projects are capable of generating significant economic, educational and image benefits for the city (e.g., Axelsen & Arcodia, 2004; Mihalik & Wing-Vogelbacher, 1993). Thus, they can become an essential part of an annual portfolio of major events. As Getz (2013) argues, bidding can help to fill the gaps in the portfolio by adding specific types of events that are oriented on a particular audience segment. However, as the results of the study demonstrated, the more sustainable methods are to create new events or grow already existing events.

6.5.2 Event roles

A variety of composing strategies guarantees the inclusion of diverse events in a portfolio. Each of the events can play its own strategic role and contribute to the overall portfolio content and depth. The research findings allowed identification of functional and qualitative roles of major events.

Functional roles reflect the purposeful intention behind hosting one or another event in the cities (Clark & Misener, 2015). This may include tourism promotion when events play a role of a core tourist attraction and generate sufficient economic contribution (Getz, 2013). This is the case of large-scale one-time events and local festivals, which motivate visitation, as well as local and regional participation. Some events catalyse development, transformation and renovation of city-scapes, including construction of new venues, reconstruction of city centres and waterfronts (Getz, 2013, Smith, 2010, Ziakas, 2014).

Major events can play a role of city image-makers and contribute to the international and national profile of a host place (Ziakas, 2013). The event planners in the cities under study considered the 2015 FIFA World Cup and the 2015 ICC Cricket World Cup as events that bring a lot of publicity, media coverage and attention. Some major events focus more on local residents and emphasise community individuality and uniqueness (e.g., Pasifika Festival, Cupa Dupa Street Festival, Midwinter Carnival). These are focal celebrations (Ziakas, 2014). Functional roles are not anchored; each event can play several roles within a portfolio, delivering multiple experiences and meeting numerous objectives.

Qualitative roles of events can be of iterative or pulsar nature. Iterative events are usually annual community-embedded events that “generally have a maintenance function – bringing people together on a regular basis to cement strong social ties and generating bonding social capital” (Richards, 2015b, p. 557). City event planners include such major

events in the portfolio by creating new or growing already existing events. A city can also own several iterative events.

Pulsar events, on the contrary, “are potential moments of change that can lead to the development of new structures, links, and opportunities...” (Richards, 2015b, p. 557). This type of event is delivered by sponsoring new, or bidding on, important international major events that require investment and new infrastructure. A balanced combination of pulsar and iterative events in the portfolio provides a diverse spectrum of experience for both locals and visitors and develops eventfulness (Richards, 2015b).

The dominance of one or the other composing strategies could lead to the shift of accent in the city event strategy. For example, Auckland, with its strategy of multiple bids for economic benefits, concentrates on the delivery of pulsar events that bring changes but do not guarantee regular community interactions, which are important for social cohesion (Richards, 2015b). In Wellington and Dunedin, bidding and sponsoring of new events are less popular tactics. Limitations in event funding pre-determines the orientation on existing events, their refreshment and growing and, hence, the pulsar changes of the city structures are less noticeable.

The use of diverse composing strategies results in varied proportions of iterative and pulsar events in the portfolio. As these roles relate to different event qualities and objectives, the task of portfolio planners is to monitor and manage the compositional structure of the portfolio in order to balance the influence of iterative and pulsar events on the host city.

6.5.3 Composing and design factors

As portfolio composing occurs within changing urban environments, event planners should take into consideration different internal and external factors that might influence portfolio composition. Chapter 5 revealed four critical design factors in the studied cities: geographical location and seasonality, local resources, demand, and industry capability.

The remoteness of New Zealand cities affects the numbers of event visitors and participants. For event owners or promoters, accessibility of a host destination often plays a critical role in decision-making. Portfolio planners should carefully evaluate this factor and either try to turn it into a competitive advantage or diminish its negative impact. The Auckland Volvo Race Stopover discussed in Chapter 5 is a good example of how a city can benefit from hosting an event that reflects and highlights its *geographical location*. Cities also can try to capitalise on their unique natural environment and wildlife, which

are comparative advantages. The task is to compose a portfolio in a way that it attracts different categories of event visitors, and particularly those who seek for an authentic experience of the place notwithstanding its geographical location and accessibility.

Since large-scale public events require open spaces, *seasonality* is an influential factor for the host cities. The problem of off-peak seasons has been extensively analysed in event tourism literature (e.g., Connell, Page, & Meyer, 2015; Getz, 2012b). For portfolio planning, decisions could be made to bid and host a variety of major business events that could provide additional visitor-nights for the local hospitality industry during the off-peak season and engage relevant city venues. Although this is a different type of event, of a specialist nature which are normally not considered as part of city portfolios, the cooperation between business event organisers and host cities seems to be promising for all the involved stakeholders.

Another tactic to solve the problem of seasonality is to bid for some international sporting events which are traditionally held during the summer in the Northern Hemisphere. A national bid to host the 2015 FIFA World Cup U-20 was an example of this. A more sustainable and long-term strategy involves creation of a major event to combat seasonality. In this case, however, a strong collaboration with the local community is required, as locals represent a key source market for events (Connell et al., 2015). Without the support of the local community, it is unlikely to realise any initiatives with regard to solving seasonality issues.

Local resources is another important design factor that determines the feasibility and quality of the portfolio design. Ziakas (2014) defines local resources as the unique capitals of a host destination that can support the organisation of events. Data analysis in Chapter 5 emphasised the critical role of city infrastructure and event funds. A strong imperative for event portfolio planners is to achieve a certain level of alignment between portfolio structure and available resources. The task is to select the 'right' events without exceeding available infrastructure and amount of public money. Feasibility studies are required to determine the perspectives of an event and allocation of event-related resources.

Ziakas (2014) argues that an effective use of local resources within a portfolio leads to the resource interchangeability, which refers to the utilisation of the same resources by different events in the portfolio. This requires collaboration and common understanding of the resource inter-dependencies and limits (Ziakas, 2013). For example, the same venues can be used as spaces for different types of events (e.g., arts, food markets, fan

zones and music festivals). The strategic portfolio planning helps to avoid competition between event organisers and plan the utilisation of the facilities in advance.

Market demand can be described as the level of the potential market and audience for an event (Ziakas, 2014). It also relates to the attractiveness of an event offer and to the benefits visitors expect to get from visiting an event (Getz, 2013). The research emphasised internal and external types of demands that have been taken into consideration by the city event planners in Auckland, Wellington and Dunedin. However, while Auckland event managers conducted a special market research in order to evaluate the attractiveness of some future major events, in Wellington and Dunedin such activities were not indicated.

Key benefits of the demand evaluation was clearly formulated by Getz (2013): “The leisure and sport markets offer virtually unlimited potential for competitive advantage, if only more is known about the motivations and social worlds of people with special interests” (p. 387). Indeed, as discussed in Chapter 5, Auckland’s programming on the basis of audience motivators fully fits this statement. If the expectations of visitors are clearly understood, then event planners can adjust event programming and offer a unique and authentic portfolio of major events.

On occasion, the demand manifests itself from the perspective of bottom-up planning when the community demand directly inform the portfolio composing. In Wellington, the Cuba Dupa street festival was revived in response to the residents’ request. Such ‘market intelligence’ (Getz, 2013) also enables the identification of the gaps in event programming. The bottom-up and demand-side approaches open new avenues for portfolio planning and development. As Getz (2013) suggests, such approaches liberate entrepreneurship and innovation in the event industry.

The last identified factor in this study is *industry capability* to plan and host major events. Capability refers to managerial and organisational expertise and strategic networking. As the findings demonstrated, the level of experience and relationships between key stakeholders determines the ultimate success of the portfolio composing. Event planners in all three cities clearly stressed the significance of building community capacity to host and leverage major events.

Community capacity is a well-developed concept in tourism and events studies. As Moscardo (2008) argues, hosting of events can catalyse skill development, knowledge exchange, and problem solving. The establishment of ‘observing’ programmes in Auckland, when event planners from other cities are invited to get a ‘behind the scene

experience' of hosting major events not only emphasises the prosperity of the event industry in the city, it also provides a platform for experience exchange and inter-regional cooperation between public event organisers. In this instance, the relationships among event stakeholders play a critical role. Ziakas and Costa (2011a) claim that an events network can become a mechanism that provides the development of social capital of a host community by encouraging collaboration between key event players. The composing process cannot succeed if it is not supported by a stable and embedded system of stakeholder relationships. The study demonstrated that the ability to coordinate stakeholders through the implementation of different tactics, including protocols and group meetings, gives the city event planners an opportunity to purposefully negotiate with the interested event-related agents and direct joint efforts to the realisation of event projects.

6.6 Emerged construct: Synergising

One of the important findings of the research is the process of synergy development while designing and implementing portfolios of major events. Synergy is understood as “integration across projects so that allocation of resources can be done in a more efficient way, either by sharing resources among projects or by improving project performance from the results of other related projects” (de Souza, Carneiro, & Bandeira-de-Mello, 2015, p. 127). Ziakas (2014, p. 135) highlights the necessity of the development of synergetic means to “attain, magnify and sustain benefits and planned legacies of events”. Capitalisation on the portfolio values entails identification of strategies and tactics that enhance synergy among events in the portfolio. In this research, three components of the construct ‘Synergising’ were discovered: balance, scheduling and leveraging.

The findings in Chapter 5 identified two different approaches to portfolio *balance*. Auckland event planners viewed balance in the portfolio in terms of the achievement of stated outcomes. Balancing in the portfolio was achieved by the relocation of outcomes among selected events. Some events were expected to make the city liveable, and some to deliver visitor-nights, new money and a positive international profile for the city. Often, the same event was expected to provide several outcomes. This was an investment oriented approach.

Wellington and Dunedin used a more audience-oriented approach to the evaluation of the balance in major event programming. However, none of the cases confirmed the existence of a strategic dichotomy between sporting and non-sporting events. This supports Ziakas

& Costa's (2010a) assumption that general attention should be shifted from merely demarcating different events toward the critical evaluation of what is valued by the local community in different event performances. The portfolio balance should cover not only tangible tasks such as balancing sporting and cultural events, but also attracting different audiences and achieving outcomes. City event planners should also aim to construct synergetic relationships between events and the host community's perceptions and expectations. From this perspective, balancing in event portfolios may be considered as a compatibility between demand of the host community and supply side that is provided by the city event planners. In order to succeed, events in the portfolio should be more city-oriented in terms of their embeddedness and connectivity with the city's cultural, heritage and historic roots. Here the concept of balance goes beyond the event realm, and represents a strategic accumulation of unique place assets. A portfolio can be authorised to play a role of a destination network, where events are used to consolidate a wide range of local attractions in order to transmit an authentic value of the city and its people.

Strategic coordination of events requires appropriate *scheduling*, when events do not conflict with each other or with other occurrences in the host city (Ziakas, 2014). As was demonstrated in Chapter 5, such coordination allowed event planners to bundle different major events of different genres and target audiences and deliver this package as a joint unique experience. Bundling refers to a deliberate staging of multiple events together on the same or adjacent dates (Xu, Wong, & Tan, 2016). By bundling two or more events together, city event planners amalgamate their resources and management of events, providing event organisers with an ability to work and communicate with various audiences.

The research provided several examples of how this strategy was implemented in the cities. In Auckland, the NRL Auckland Nines tournament, a concert of Eminem and the Lantern Festival were staged during the same weekend. In Wellington, the Visa on a Plate Festival was bundled together with the LUX Festival of Lights. This delivered a captivated celebration that engaged city residents and visitors into an array of festivities around the city. In Dunedin, a new city event, Vogel Street Festival of Street Art was deliberately bundled with the annual Heritage Festival in order to use an opportunity of cross-promotion and audience attraction. The results of this study support previously conducted research in bundling (Xu et al., 2016) in that staging multiple events concurrently provides an effective relocation of available city resources, including infrastructure, promotion budgets and pools of volunteers. A series of bundled events create an attractive festivity atmosphere in the city and new or smaller events benefit from

co-scheduling by sharing the audience base and publicity with larger well-known city events.

Portfolio synergising paves the way to *leveraging* of major events. The research findings confirmed that an event portfolio could consolidate different event-led and event-themed initiatives (Smith, 2013) that extend the benefits from hosting large-scale events and contribute to the development of other areas of city life. Leveraging strategies expand the portfolio usefulness and integrate events into a wider business and community environment.

The three studied cities utilised the leveraging opportunities differently. Auckland event planners strategically evaluated perspectives of events in the portfolio and developed separate leveraging plans for each large event. In Wellington, attention was usually paid to the events of national and international significance. In Dunedin, the research detected a lack of leverage-oriented strategies. However, the interviewees from the cities clearly emphasised the integrative role of major events and their impact on the realisation of important projects in the cities, including new infrastructure construction, development of creative industries, employment, youth engagement and city brand promotion. The process of Synergising facilitates the contiguity of events and related initiatives.

Overall, the synergy within a portfolio of events via balancing scheduling and leveraging provides the ‘gleaning’ of all the separate entities, including the events themselves, leveraging opportunities, scheduling and genre representation. The synergetic value of an event portfolio makes it an indispensable planning tool for city planners who aim to construct and reinforce the uniqueness and attractiveness of their city for different audiences.

6.7 Applying event portfolio design within different local contexts in New Zealand

This section summarises the discussion in the chapter and sets the ground for the applicability of the suggested theoretical model in different urban contexts. The pragmatist perspective of the research warns of using any universal generalisations from the cases. As explained in Chapter 3, knowledge is always context-dependent: thus, any derived theoretical assumptions should not be evaluated in terms of universality, but rather in terms of valuable contextual insights. Such insights can be applied in other situations and environments, however, the focus on the local context should always guide the application process.

In New Zealand, management of cities sets in the context of local governments that are responsible for social and economic development and play a broad role in promoting cities investment attractiveness, infrastructure development and overall wellbeing of the local community (Nel, 2014; Pearce, 2015a). As Chapter 4 demonstrated, local governments in Auckland, Wellington and Dunedin tend to be directly engaged in major events, supporting strategic initiatives by ‘in-house’ operations within the councils or by recent inclusion of major events into the agenda of the established semi-autonomous agencies responsible for local or regional economic development. The nature of the analysed CCOs (ATEED, WREDA, Enterprise Dunedin) predetermines their market-led orientation in events sector. Nel (2014, p. 74) argues that economic agencies in New Zealand are “overwhelmingly focused on pro-market support with there being minimal consideration of broader social and community-based economic development”.

This narrow specialisation leads to a situation when an overall population of events in the cities is segregated on those that are major and bring visitors and new money, and those that are smaller and serve community needs. Such an approach cultivates not only a disproportion in government support but also considerably downplays social and cultural importance of major events. The policy frameworks in the studied cases emphasise major events’ economic, marketing and investment potential.

Getz (2013) suggests that the success of most large events depends upon local audience and community support. In this research several issues were identified regarding the authenticity of the staged major events and their ability to ‘tell a city story’. Findings from Auckland illustrated problems with the city anchor events that had been losing their distinctiveness in favour of economic results. In Wellington, some events from the portfolio had not been evaluated for several years, and there is no understanding of their value to the community. In Dunedin, success of an event correlated with the degree it fits the ‘city flavour’ and highlights the uniqueness of the place, its people and culture. However, no measures were developed to evaluate the delivery of these requirements.

As a process of strategic visioning, Imagineering can provide a platform for balancing the government expectations from events and community perceptions and needs. The discussed elements of Imagineering cover all the critical dimensions for strategy development in major events where community-based considerations should play one of the leading roles. Implementation of Imagineering is a context-oriented process, where comparative, competitive advantages and internal values guide the creation of story-telling and further consumption of unique experiences of places. It is unlikely to produce

a good story about a city without involving its community in the discussion of authentic meanings and interests. Crespi-Vallbona and Richards (2007) point out critical functions of events as arenas for community public discourse on wider socio-cultural, economic and political issues. A portfolio of events grounded in Imagineering can become a constellation of such arenas, providing a city with a strategic rotation of authentic experiences multiplied by economic and social benefits and investment opportunities.

To implement such a balanced approach, event planners in Auckland, Wellington and Dunedin will need to move forward from being a reactive ‘one-stop-shop’ for major events to a proactive ‘go-shopping’ approach, when city events teams facilitate community discourse and adjust their event strategies and portfolios to the current needs and requirements and not to the ephemeral and vague ‘public good’ criteria. Moreover, Imagineering opens opportunities for co-creation of event portfolios, where creative processes of events programming are stimulated not only by the responsible public agencies, but also by interested community groups and even individuals (Richards & de Brito, 2013).

The discussed process of Approaching in the three cities emphasised a strategic necessity of regulating and correcting the applied approaches in order to meet the requirement of the changing economic, social and political environment. The findings provided a ground for some initial theoretical assumptions with regard to the development of a balanced Approaching process in Auckland, Wellington and Dunedin. Thus, it is possible to emphasise several configurational aspects that fit the needs and requirement of all three destinations.

In terms of formality, Auckland’s case demonstrated advantages of developing an overarching event policy framework with clear objectives, targets, written rules and protocols. Such a framework requires an in-depth analysis of the existing situation with major events in the city, evaluation of relevant resources, facilities and industry capacity to plan and host events. Wellington and Dunedin lack such a detailed framework. Decisions should be made to contextualise and elaborate a set of regulations to intervene and lead public events sphere in a more consistent and strategic way.

A portfolio of events should be treated as a strategic composition of events. The overall success of the portfolio is planned and measured on the portfolio level and not on the level of separate events. This approach provides city event planners with a useful project management tool. The example of Auckland’s portfolio of major events proves the validity of the portfolio concept in comparison, for example, with the Dunedin’s

portfolio-list of events. Room for innovation, creativity and community expression should exist in any event portfolio, as it will prevent portfolios from being a simple grouping of investment assets and guarantee its openness, flexibility and vitality. Indeed, events accumulate an array of stakeholders, experiences, values and interests. As with any open system, it requires continuous renewal and inclusion of different agents that can contribute to its development and prosperity. The cases of Auckland, Wellington and Dunedin highlighted the importance of regular monitoring of the situation on the market. What is required is a more intensive cooperation and collaboration with a wider local community in order to understand the current needs and identify areas where major events might be able to assist. This will lead to the construction of sustainable portfolios that meet the requirements of destination capitals framework discussed in Chapter 2 (Section 2.5.3).

The level of Formality depends on the current stage of the major events industry development in a city. Both amorphous and standardised ends of the continuum, discussed in sub-section 6.4.1, directly influence the degree of intentionality.

Intentionality of the portfolio approach calls for a careful consideration and evaluation of the portfolio purposes. The case of Auckland demonstrated a strongly outcomes-oriented perspective of the city event planners, which provides the city with a strategic matrix to evaluate and plan events in accordance with the stated purposes. Wellington and Dunedin have less defined strategic goals regarding hosting major events. The task is to clearly formulate a set of purposes for which the events in the portfolio should be organised. This tactic will guarantee the consistency of the portfolio with overall city plans and objectives.

Another requirement is to achieve balance between economic and socio-cultural directions. The findings of this study delineate a strategic slant in the direction of economic measures of success in the applied approaches. Resting on the Imagineering process, it is imperative to consider the whole spectrum of experiences and benefits which major events are able to deliver. Thus, apart from purely economic values of major events, attention should be paid to the socio-cultural domain, in order to meet the community perceptions and construct an authentic and sustainable portfolio.

In terms of Directionality, strategic decision-making about portfolios of major events determines orientation of the approach on internal or external demands. Ideally, decisions should be driven by internal requirements. This prevents city event planners from reacting on abruptly emerged opportunities on the event market. The case of Auckland indicated several problematic situations that might occur while cooperating with the event right

holders and promoters. Moreover, the reactive variant does not provide cities with a flexibility in event programming, when they can strategically search for desirable events and not just adjust available offers. A ‘go shopping for events’ process in the cities should be proactively tied with the city’s needs and community demand.

As suggested by Malek and Costa (2014) a strategic approach for the community integration into the decision-making process can be applied in the cities under study. A simultaneous utilisation of network, direct participation and survey strategies “will support lateral and creative thinking to solve problems and foster the generation of innovative plans” (Malek & Costa, 2014, p. 16) for the development of a community-oriented and community-integrated major events programming. Networking engages public organisations, government agencies and the private sector into a collective process of discourse, strategy-making and partnership development. This will lead to knowledge sharing, information exchange and creation of a collaborative environment. Direct participation of community groups, individuals and the private sector increases the collaboration between different actors and distribution of tangible and intangible resources (Presenza & Sheehan, 2013). In this regard, regular meetings with the representatives of interested community groups can provide a solid platform for developing the local event sector and enhancing the value of the overall portfolio offer. Periodically organised opinion polls can provide truthful feedback and outline current community priorities and concerns with regard to staging major events and the overall success of portfolio initiatives.

The types of decision-making and collaboration affect the levels of Rhythmicity of the approach. Although the three studied cases applied relatively different approaches, the evidence in all the cities emphasised the need for refreshment and change. Periodical evaluation and revision of the portfolio approach is a necessary activity. This includes reviews of directions, statement of new goals and assessment of portfolio progress and results. A critical mass in the public events sphere guarantees the availability of a basic cluster of events and relevant resources and facilitates the process of rhythm changes. A rhythm of an approach can lean towards a passive end of the continuum in order to prevent any risks from changes; it can become more intensive if the opportunities to gain more positive results appear. For Auckland, for example, it is vital to refocus the major events strategy on the local market, trying to create or grow some events with strong roots in the community. The stated event objectives should also be critically examined and modified to achieve a wider spectre of benefits. Due to the current changes in the institutional structure, Wellington requires the development of a new strategy and, as a result, new

criteria for success. In Dunedin, the rhythmicity of the portfolio approach should be changed in response to the review of the current festival and events strategy and changes in the city's economic development strategy.

Realisation of the Composing process in Auckland, Wellington and Dunedin depends on the objectives and design factors that influence the compositional structure of portfolios. As the findings indicated, the context differences determine the style of this process in the cities. This can be illustrated by a variety of composing strategies and event roles. As the largest economic area of the country, Auckland was able to bring large investment resources into its event industry. The city actively bid on events in order to achieve return on investment and attract international attention to the city. This strategy corresponds with the discussed general orientation of the local government on economic indicators. In this case, bidding and sponsoring deliver the desirable combination of events that meet the requirements of the stated outcomes. Other strategies, growing and creating, play a peripheral role, as they cannot guarantee short-term success.

Wellington and Dunedin, on the contrary, had smaller investment budgets. Their common strategies were to grow events, modify events owned by the city and create new events to fill the gaps in the calendar. The identified composing strategies provide a flexible design instrument that can be tuned in accordance with the current city needs and plans. A strategic slant into one or another strategy of composing may result in an imbalance in the portfolio structure. It seems to be more beneficial and sustainable to apply diverse tactics in order to target different audiences (local, national and international) and achieve different outcomes (economic, social, cultural and reputational). Pulsar events, which bring changes and attention, can be included into a portfolio via bidding and sponsoring, whereas iterative events, which strengthen community values, could be created and grown.

Any event destination needs to critically evaluate an interplay of different factors that have an effect on the selection of composing strategies. The degree to which each of the identified factors affects the portfolio design may vary. Dunedin, for example, is one of the southernmost cities in the world with long and cold winters and seasonality is a significant factor not only for the city's major events, but the whole tourism and hospitality industry.

The availability of resources in Auckland differed from both Wellington and Dunedin. This influences the inter-city competition for some major events and defines the decision-making process and bid awards. However, even smaller event destinations can

proactively utilise available facilities. As was analysed in Chapter 5, Dunedin benefitted from hosting large-scale sporting events by exploiting its covered stadium. Wellington event planners try to engage the whole city centre in event hosting, utilising pedestrian areas, small parks and the central square as event facilities.

Industry capability set the pace for the level of portfolio management and creation of an overall event-friendly environment. The high level of industry expertise in Auckland allowed city event planners to cooperate effectively with event promoters and organisers, providing them with a ‘one window service office’, when every project is controlled and facilitated by an appointed manager. Recently, Wellington has also tried to improve its major event capability by including events in WREDA activities and working with them as strategic city assets.

Dunedin should carefully examine its current expertise in major events. Although the city proclaimed itself as a vibrant and user-friendly event destination, the logistics did not support this vision. For example, at the time of this research, there was no public connection between the airport and the city. The only way for visitors and event attendees to come to the city centre was by booking commercial transport. Such a deficit of strategic management and planning can affect all city initiatives to improve and promote its image. Under the pressure of budget reduction, the small city events team could more actively engage with the community groups and business in order to enhance networking and overall city competence in hosting big events.

Synergising accumulates the event portfolio’s design activities for developing and enhancing its overall value as a strategic grouping of major events. Synergy occurs in the portfolio balance, leveraging, and opportunities to manipulate with event scheduling, including cross-promotion and event packaging in the cities. The synergetic value of an event portfolio represents the ultimate design stage, when events in the portfolio complement one another and the whole portfolio positively contributes to the development of destination competitive assets and positive outcomes.

As with the other three processes, Synergising is grounded in the peculiarities of the local context. For Auckland, portfolio synergy was viewed in the balance achieved by events outcomes, whereas Wellington and Dunedin are more focused on genre diversity and accessibility of events for different groups of the population. Leveraging is a desirable goal, but only Auckland strategically approach this sphere. Wellington and Dunedin require a refresh of their current policy framework in order to institutionalise leveraging mechanisms and clarify the ways of their implementation. In all three cases, city event

planners use the opportunity to manipulate with the dates, frequency and reach of the events in order to synergies discrete events and achieve a long-lasting positive effect from staging a continuum of major events.

6.8 Summary of the chapter

Overall, the results of this study provide new advances about the design of a portfolio of major events within different urban contexts. The key contribution of the study relates to the identification and discussion of the four strategic constructs that shape the portfolio design and its development. These are Imagineering, Approaching, Composing and Synergising. The interplay of these four processes affects the portfolio planning, its synergetic values, as well as overall vision on major events and their utilisation. The proposed theoretical model suggests an innovative and creative perspective on major events programming. The results of the discussion are limited to the reality of three studied cases. The emerged knowledge, however, can serve as a solid basis for further exploration of event portfolios. The developed constructs can be utilised in other places applying a pragmatist context-driven approach.

The next and final chapter provides a summary of the research, highlights practical and theoretical contributions of the research, discusses its limitations and suggests a set of recommendations for future research.

Chapter 7: Conclusions

7.1 Introduction

This chapter summarises the research. The overall aim of the research was to investigate the complexity of major events portfolio design and its implementation in three cities in New Zealand: Auckland, Wellington and Dunedin. The research question that guided this study was formulated as follows: how do city event planners in New Zealand design portfolios of major events? The first part of the chapter presents a summary of the research. It overviews the research design, stated objectives and the ways in which they were addressed. The second part focuses on the theoretical contribution of the thesis and its practical implications. The chapter concludes with the limitations of the study and future research directions.

7.2 Summary of the research

This study intended to advance the empirical and theoretical understanding of the phenomenon of event portfolios, portfolio design processes and overall utilisation of event portfolios in the cities. The four stated objectives of the thesis were:

1. To understand the commonalities and differences in public sector institutional and policy contexts and their influence on the realisation of event portfolio approaches in Auckland, Wellington and Dunedin;
2. To identify the underlying layers of event portfolio planning in the three cities under study;
3. To examine the key areas of event portfolio programming in the cities under study; and
4. To develop a model and explain core strategic processes of event portfolio design in Auckland, Wellington and Dunedin.

The research was directed by the ontological perspective of critical realism and pragmatist epistemology. Following a critical realist standpoint, the portfolio of events was viewed as a real object or actual conception, defined within certain borders of everyday life. Major event programming was considered as a real process of decision-making and interaction between different actors within real contexts.

Pragmatism led the research into the action-oriented inquiry, where the results of the research inform human practices and suggest solutions for concrete problems. As suggested in Chapter 3, pragmatist knowledge is always partial and limited to the geographical or historical context. Any theoretical or practical generalisations have no value. The validity of knowledge can be transferred to, and applied in, other settings, if the differences of the contexts and circumstances are taken into consideration. From this perspective, the results of this research should not be seen as a generalised ‘elixir’ but as a guide to address particular issues of major events planning and management in diverse urban areas.

The study adopted a multiple case-study methodology. Several cases facilitated inter-case comparisons, as they presented different case situations (Brotherton, 2015). The replication logic (Yin, 2014), utilised in the study, provided the researcher with three cases drawn from Auckland, Wellington and Dunedin. The expected similarities and differences of the selected cases derived from their contextual environment, including city size, institutional arrangements and event policy frameworks.

Primary data were collected by interviewing city event planners from City Councils and relevant council-controlled organisations. Secondary data were obtained by document selection and analysis, including city event policies and strategies, annual reports, statements and activity plans. Thematic analysis was applied to identify and analyse critical patterns. This type of data analysis facilitated the descriptive organisation of the data and the interpretation of the key aspects of the research (O'Reilly & Kiyimba, 2015).

The findings resulting from the first objective of the study indicated a critical role of the contextual environment in the development of portfolio approaches to major events in Auckland, Wellington and Dunedin. Institutional structures and event policy frameworks in the cities determined the nature of the applied approaches. Three different variations of event portfolio approaches were explored. In Auckland, a separate management of major events by a semi-controlled economic development agency, ATEED, led to the realisation of an outcomes-driven portfolio strategy. A well-developed event policy framework including strategies, policies, and protocols, centred the approach around the stated outcomes. An agnostic attitude to the genre diversity of events in the portfolio refocused portfolio planners from balancing different types of events in the portfolio to identification and satisfaction of visitors’ motivators to attend and participate in events.

The approach involved aggressive bidding campaigns and hosting major events that could significantly contribute to the city's economy and image promotion.

Event planners in Wellington utilised an approach that delivered a content-rich minimum of major events. The decision-making was informed not merely by economic benefits, but also by cultural and social expectations. A lack of event funding was compensated by the 'adding new elements' planning tactic, when the programmes of already existing events were enriched by new festivities, celebrations or attractions. This innovative strategy provided a revitalisation of both an annual portfolio and an overall city offer to the city visitors. Current changes in the city's institutional structure caused by a creation of a regional economic development agency, WREDA, put the city into a transformative stage of the portfolio development. New regulations and a handover of major events from the City Council to the new agency transformed the way major events used to be planned and delivered.

The findings from the case of Dunedin indicated the existence of an ad-hoc non-strategic approach to major events. A merged management of local, regional and major events and a lack of clear policy guidelines determined simplistic programming of major events. Such an approach manifested itself in an absence of strong selection criteria and in a hereditary programming, where events were supported and organised due to historically-formed traditions, even if they did not meet current city objectives and expectations.

The findings for the second research objective demonstrated that the key underlying principles which determined strategic utilisation of major events in Auckland, Wellington and Dunedin, lay in the sphere of constructing a unique place identity and development of city desirability through hosting major events of international and national significance. Desirable profiles of the cities were constructed around historical and geographical distinctions, urban planning, tourist attractions and visitor experiences. Major events were seen as a significant image and reputational assets that could be used to highlight competitive advantages of the cities, to attract national and international attention and to showcase their vibrancy, creativity and liveability.

Addressing the third objective of the research, this thesis identified the following key areas of portfolio programming in the cities: portfolio assembling strategies, critical design factors and portfolio integrity. The assembling strategies, which include owning of events, growing, creating, sponsoring and bidding for major events, contributed in various ways to the portfolio structure. Owning provided a degree of a control over the

event's rights and related properties. Creating and growing supplied the portfolios with a set of home-grown events that met both the community expectations and market demand. These strategies were used to fill the genre and entertainment gaps in the portfolio. Sponsoring allowed investment in events that met the articulated requirements. Bidding strategy was directed towards the enhancement of the city's international profile through hosting large-scale events, as well as to the achievement of significant economic benefits. The usage of a particular assembling strategy was dictated by the cities' ability to attract and to invest organisational and financial resources into major events.

An interplay of design factors affected the compositional structure of the portfolios of major events in the studied cities. Seasonality and geographical location, local resources, market demand and overall event industry capability to plan and host large events influenced the assortment of events in portfolios, their calendar distribution, orientation on particular target markets, organisational quality and stakeholder management.

Portfolio integrity was described in terms of portfolio balance, scheduling and leveraging of events. The notion of portfolio balance in the cities was used with two different meanings. In Auckland, the applied outcomes-driven approach pre-determined the vision of balance in terms of meeting particular outcomes. In Wellington and Dunedin, portfolios were balanced by adjusting event genres and audience accessibility. Event scheduling means an ability of city event planners to manipulate the calendar and the distribution of events in it. This may be helpful in bundling events together in order to cross-promote events and unite resources, such as venues and media coverage. Leveraging of events promotes integration of events and portfolios with other city objectives. Portfolios facilitate the development and delivery of joint leveraging and legacy initiatives, when events play a role of catalysts for realisation of different event-led projects.

The findings and conclusions about the first three objectives of this research provided a platform to achieve the fourth objective. A theoretical model of event portfolio design was introduced and explained in Chapter 6. The model reflects a strategic relationship between four design processes: Imagineering, Approaching, Composing and Synergising.

Imagineering sets the pace for the strategic use of events in the cities. As a creative concept, Imagineering is responsible for the vision and creation of unique event-scapes based on local comparative and competitive advantages, as well as on the internal values of a host city. Through this process, city event planners formulate and evaluate the general

purpose for staging events and constructing portfolios. An array of different aspects should be carefully examined, including values and perceptions of the local residents, current city ambitions and city points of difference that can hardly be copied by the competitors. Imagineering is a process of place visualisation and experience creation. As discussed in Chapter 2, destinations can construct their identity but not their brands, which always exist only in the mind of consumers, event visitors and local residents (Moilanen & Rainisto, 2009). Therefore, Imagineering should always be supported by the realisation of particular strategies aimed at enhancing and promoting a city's values and assets.

Approaching constructs a framework for events programming. It determines the style of portfolio planning and management. The Approaching process is driven by the strategic vision, overarching portfolio strategy, in-depth analysis of the available resources and industry capability, collaboration with the local community, periodical evaluation and renewal of the applied approaches. Parameters of Approaching, discussed in Chapter 6, include formality, intentionality, directionality and rhythmicity. These can be used to adjust the applied or planned major event strategies to the current needs of the cities.

The third process, Composing, deals with the compositional structure of a portfolio. From a strategic perspective, city event planners should clearly understand what events to include, what assembling strategies to use, and what roles each of the selected events are to play within a portfolio. The findings of the study revealed functional and qualitative roles of events. Functional roles determine the purposeful intention behind hosting events, including tourist attraction, image-making, community celebration or city revitalisation. Qualitative roles include iterative and pulsar characteristics. An iterative event is more community-oriented, with a purpose to bring people together and establish strong social connections. Pulsar events deliver changes, new community links and relationships.

Finally, Synergising focuses on the development of the overall portfolio value, its unity. Portfolio synergy provides event planners with an opportunity to balance events and their outcomes, to manage the portfolio calendar and proactively plan any leveraging strategies. In a synergetic portfolio, events complement one another and produce an integrative network of objectives, resources, stakeholders and expertise.

The interplay of the discussed processes determines and specifies the nature, structural characteristics and values of the portfolios of major events. The planning and application of each of the processes requires a strategic understanding of the 'DNA' of the city,

including its geography, historical and cultural roots, community aspiration and overall industry capability.

7.3 Theoretical contributions

Taking into account the explorative nature of this research and limited academic literature about event portfolios, the thesis enhances the body of knowledge in the area of event studies and event portfolio theory. The study provides a comprehensive review of the roles of event portfolios in the contexts of event policy, event strategy and event management. The thesis offers insights into how city event planners apply different portfolio approaches and what principles govern the realisation of city-wide major event strategies.

The research details underlying layers of portfolio design, compositional strategies, event roles, design factors and overall portfolio synergetic value. It contributes to the development of event portfolio theory (e.g., Getz, 2013; Ziakas, 2014a; Ziakas & Costa, 2011a) as it does not merely concentrate on the portfolios as finite groupings of different events, but focuses on the technology that determines the realisation of portfolio-centred initiatives. The thesis proposes a theoretical model of event portfolio design that explains the complexity of this process and covers all the critical domains related to planning and development of major events in the cities under study. The study provides a rich and broad context which helps to understand the ways major events can be strategically utilised by cities in order to deliver positive reputational benefits and strengthen a local competitive identity.

The thesis stretches the body of knowledge by conducting an in-depth comparative analysis of the portfolios of major events in New Zealand. To the knowledge of the researcher, this study is the first attempt to discover the portfolio patterns within several cities in one country. Previous research utilised ethnographic and single-case methods (e.g., Clark & Misener, 2015; Ziakas, 2007). The focus of these studies was on small communities and their portfolio-related strategies and initiatives. The subject of this thesis grasps different urban contexts and event policy styles. This factor widens the research horizon of possible major event portfolio strategies and portfolio modifications.

The research also contributes to the theories of place-making, competitive identity and eventfulness by demonstrating the strategic usefulness of event portfolios in developing long-term city assets and unique points of difference. Portfolios are capable of

maintaining lasting attention to a city or an event destination; they are able to integrate and manage disparate and usually competitive events and unite different event stakeholders.

7.4 Practical implications

The findings of the study have far-reaching implications for professionals involved in the public event sphere. This research identified a set of critical aspects of major events portfolio design within different urban contexts. Persons interested in major events management, city event programming, portfolio planning, and destination management will find the evidence from this research useful.

For city event planners, the study offers insights into what principles should be taken into account as a basis for the strategic realisation of major event-related initiatives in a city. In particular, the study suggests that identification and critical evaluation of the city's existing advantages and points of difference should become a starting point for the development of a city-wide event portfolio approach. As a theoretical concept, Imagineering provides a wide range of tactics that facilitate the formation of a vision on the role of major events in the development of a competitive place identity. The grounding essence for major events portfolio planning manifests itself in the cities' desire to achieve uniqueness and attractiveness as an event destination. Major events can be treated as a tool to deliver an exclusive experience of the city and to attract international attention to the city. The process of Imagineering accumulates different strategic initiatives within the city's public sector and involves all interested stakeholders, as it is an important stage of the city development where all the interests and perspectives are taken into consideration.

Secondly, city event planners could consider how different event portfolio approaches affect the realisation of the event-related strategies in cities. There is no one best way for Approaching. The adoption of different forms of portfolios of major events identified in this study should be congruent with the current destination objectives and supported by the available resources and overall industry capability. Suggested parameters of Approaching can serve as a guide to evaluate and modify already existing strategic initiatives in cities.

Finally, the research findings about portfolio Composing and Synergising provide city event planners with a portfolio creation framework. This framework explains what strategies can be used to compose a city's annual programme, what roles events can play

within this strategic grouping and what factors could affect the portfolio design. Through the process of Synergising, city event planners could develop a strategic balance within the portfolio, realise a set of leveraging opportunities as well as adjust the calendar distribution of events and plan cross-promotion activities.

Taking into account the fact that representatives of all three studied cities expressed interest in the results of the research and their possible application, an executive summary of the study will be prepared for each of the cities. Recommendations on how to apply a suggested portfolio design model will be presented as a written report with an opportunity to organise a workshop or an oral presentation.

7.5 Limitations of the research and future research directions

This section outlines the limitations of the thesis and set directions for future research. Being a qualitative research, the thesis relied on a small sample of cases. The data were collected in three cities in New Zealand: Auckland, Wellington and Dunedin. Initially, another city, Christchurch, was also planned to be included in the study. Christchurch represents an interesting destination for event portfolio investigation. The city suffered from a series of earthquake events in 2010-2011. Today, city planners implement a wide range of urban re-development strategies, including major events, as a tool for image enhancement and city renovation. However, a lack of interest in the research project, demonstrated by the invited practitioners, determined the exclusion of this location from the study.

Further empirical research in different cities could extend the scope of the research and contribute to the findings and discussion of this study. Moreover, the presented portfolio design model could be further explored and developed in other destinations with established infrastructure for major events planning and development. A comparative analysis of the applied portfolio approaches and portfolio designs in different countries could enhance the understanding of the portfolio planning and development within different socio-cultural and historic contexts. In particular, it would be interesting to expand on a diversity of approaches, applied in different cities and to develop further the parameters of portfolio approaching. The researcher intends to test this theoretical model in Manchester, UK, within the research project supported by the University of Derby. The objective is to evaluate the applicability of the model and to widen the evidence base.

The research was focused on major events. In all three cities major events are seen as key contributors to city prosperity and destination development. The term 'portfolio' in the cases refers to a strategic grouping of large-scale events and excludes other smaller local or regional events. This limits a configurational diversity of portfolios. Future research could investigate a rationale for including small-scale events in city event portfolios and the contribution of such events to the overall success of applied event approaches.

This research examined the perspectives and standpoints of public sector agencies and relevant divisions within City Councils. These organisations assumed a leadership role in the development of city event strategies and event programmes, which was confirmed by the analysis of the event-related city documents and mass-media. The interviews were conducted only with managers who held a high-level status in decision-making within the targeted organisations. This strategy limited the number of the relevant respondents, in particular in Wellington and Dunedin. In contrast to Auckland, these cities had very small events teams with only a few managers responsible for portfolio design and major events planning. This condition called for a 'less is more' approach (McCracken, 1988) when it was more beneficial to work intensively with a few people who possessed the required experience and expertise than to interview many managers with partial knowledge.

Future research can target other interested groups in the cities and evaluate their expectations and perceptions about currently implemented strategic event-related initiatives. It would be beneficial to investigate opinions of other important stakeholders, such as local residents, event organisers, community leaders and professional associations. Opportunities for future research are also presented by the other research methodologies, for example, a quantitative study may assist in examining perceptions and expectations of the local residents about the city's annual programme or portfolio of events. Statistical analysis and generalisation may add a quantitative dimension to the evaluation of current major event strategies and portfolio nature in different urban areas.

Other opportunities for future research may be found in the investigation of inter-organisational relationships and event networks in different cities. The process of portfolio planning and development involves a wide range of organisations and institutions with their own interests and perspectives. An exploration of the network relationships may provide grounds for revealing other aspects related to the decision-making and strategy formation around major events utilisation and portfolio planning and development.

Future research could also further examine the synergising process of the portfolio design. It would be particularly useful to explore the relationships between recurrent and one-off major events in the events portfolio. It is important to explore if there is an optimal proportion of such events in the portfolio, as well as the nature of leveraging objectives that can be planned in advance to capitalise on hosting events of different scale and significance. The relationships between portfolio planners and one-off major event organisers and promoters is another important area for future studies. It could shed light on the aspects of event scheduling, events rights, branding and co-branding, and how all these challenges can be solved within the realm of event portfolios.

In conclusion, the design of event portfolios is a topic that has been increasingly attracting academic attention within the last decade. This thesis developed a greater understanding of the strategic processes that determine the nature of event portfolios and their design specifications. The strength and significance of this research lie in its methodological and theoretical foundations. This is the first study that comparatively explored portfolio design patterns in different urban areas within one country. The study offered insights into how city event planners apply different portfolio approaches and what principles govern the realisation of city-wide major event strategies. The suggested event portfolio design model serves as solid starting point in discovering the complexity of the portfolio, its nature, structure and value.

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Appendices

Appendix 1: Letter seeking permission to conduct the research

Dear _____

Please let me introduce myself and the purpose of this letter. My name is Vladimir Antchak and I am an Auckland University of Technology (AUT) student. I am conducting a PhD research that aims to explore factors, strategies and initiatives that influence the planning and development of event portfolios (EP) in large cities in New Zealand.

I am writing to request permission to conduct a research study at your organisation. This project involves semi-structured interviews with persons responsible for events planning, destination promotion and urban development, as well as the analysis of the relevant documents regarding EP design. I hope that you will allow me to recruit members of your staff and to conduct a series of interviews with them. If approval is granted, the potential participants will be informed about the research and, should they agree, convenient date, time and location of interview will be discussed. The time requirements will be 60-80 minutes for a semi-structured interview.

The results of the research will be used to write up my Doctoral thesis. This research may have significant implications for event policy and event management in New Zealand, providing city managers and event planners (both on national and regional levels) with valuable insights with respect to the ways to build a balanced and successful portfolio of city's events.

Your approval to conduct this study will be greatly appreciated. I will follow up with a telephone call next week and would be happy to answer any questions or concerns that you may have at that time. You may contact me at my email address: vladimir.antchak@aut.ac.nz.

If you agree, please kindly respond to me acknowledging your consent and permission for me to conduct this study at your organisation.

Thank you for taking the time to consider my request.

Yours sincerely,

Vladimir Antchak

Appendix 2: Participant Information Sheet

Participant Information Sheet

Date Information Sheet Produced:

15 August 2014

Project Title

Event portfolio design: Exploring strategic approaches to major events in New Zealand

An Invitation

Hello,

You are invited to participate in the research project conducted by Vladimir Antchak (AUT). Your participation in this research is valued and would significantly contribute towards a greater understanding of the way city and event planners in New Zealand design and manage their local event portfolios. Your participation is voluntary and you may withdraw from the project at any time prior to the completion of data collection. This form contains information regarding the research you are being asked to participate in, which you may retain for your records.

What is the purpose of this research?

The purpose of the study is to explore which factors, local strategies and initiatives determine the design of a city's event portfolio. An event portfolio approach envisages events as strategically selected resources which can be used to support destination marketing, economic and social development, and tourism promotion campaigns. Although quite a few cities in New Zealand actively plan and develop portfolios of events (PE), in certain situations for a variety of reasons, a lack of finely developed theoretical concepts and empirical research into the nature of PE and their design patterns has been found to exist. The primary research question of the proposed research project is formulated as follows: How and why do city event planners determine and design the portfolios of major events in large and medium-sized urban areas in New Zealand?

The specific objectives of the research are:

- To identify the principles that have driven the realisation of the major event portfolio approaches in Auckland, Wellington and Dunedin;
- To explore the strategic nature of the event portfolio approaches applied in the cities under study;

- To examine the key event portfolio design dimensions in the selected event destinations.

This research is undertaken as part of a ‘Doctor of Philosophy’ (PhD) qualification and will result in a Doctoral thesis. The research findings will also be utilised for the purpose of publication and/or presentation in an academic context.

How was I identified and why am I being invited to participate in this research?

Based on your position and role in the organisation, I understand that you have been responsible for the development and management of the current events programme. Your contact details have been obtained via an analysis of the City Council’s web-resources and officially published documents.

What will happen in this research?

If you agree to participate, you will be asked questions regarding your knowledge and understanding of the event management processes in your city. The research will focus on participants’ understanding of the strategic roles of events, current events policy, events programme/calendar, events development and management, local events promotion and marketing campaigns. In addition to that, relevant official documents will be analysed. The collected data will be used only for the purposes for which it is collected (PhD thesis and academic publications/presentations).

What are the discomforts and risks?

There are no known risks to participation in this study. However, some of the questions and further discussion may pertain to issues such as stakeholders’ conflicts, organisational challenges and obstacles. These types of questions will not ask for names, locations, times or specific incidents, rather they will ask about the general occurrences and how these occurrences have been addressed. You may feel uncomfortable discussing issues that have been faced by you/your organisation. You may be concerned that you or the group/team you are involved with may be able to be identified because of the research.

How will these discomforts and risks be alleviated?

Your responses are confidential and will be stored securely in a database with a limited access. All questions are optional. You may choose not to answer some questions.

What are the benefits?

Your participation in this research project would help the researcher to explore the city’s event portfolio including key strategies and mechanism related to the design. The results of the research will be analysed to complete my PhD programme at AUT and to write up my Doctoral thesis. The findings of the research will contribute to, and further the understanding of, the event portfolio phenomenon. This research will have implications for event policy and event management in New Zealand, providing city managers and event planners with valuable insights in relation to the ways to build a successful EP.

How will my privacy be protected?

Any information that is obtained in connection with the study and that can be identified with you will remain confidential. The researcher will take steps to protect the confidentiality of data although it is possible that responses may be attributable to individual participants because of the small pool of potential participants relevant to the study. While names, contact details and position information will be collected for the interviews, upon transcribing the data, all personal identities will be removed. All participants will be asked if they agree to the use of their position title held within the city

to lend greater credibility to the results of the research. If participants wish to use a generic position title (i.e. city events planner) rather than the official title to help protect their identity, all transcribed data and presentation of results will use the generic title. No names will be released with transcribed interviews or results. However, the locations (Auckland, Wellington and Dunedin) will be identified in the final report in order to emphasise and analyse specific strategies, which influence planning and development of event portfolios in these destinations. All interviews will be audio recorded and transcribed with the permission of the participant.

What are the costs of participating in this research?

If you wish to participate, the time requirements will be 60-80 minutes for a semi-structured interview. Date and time of the meeting will be discussed and agreed upon so that it is convenient for you. You will be able to suggest a location that best suits your needs. There is no monetary cost for the participation in the research.

What opportunity do I have to consider this invitation?

You have three weeks to consider this invitation. Formal data collection will begin from 20 August 2014.

How do I agree to participate in this research?

To participate in this research project, you will be asked to give a written consent. Before the semi-structured interview begins, I will provide you with the necessary forms to complete. I can email these to you in advance.

Will I receive feedback on the results of this research?

As a participant you will have an opportunity to check and correct the transcript of your interview. If you agree, I will inform and update you regarding the progress of the research and, whenever possible, will seek feedback from you to allow the research to gain additional value from the perspective of practitioners, involved in city development projects. After the research is completed, an executive summary of the research will be produced and distributed among all the participants who have agreed to receive it.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr. Tomas Pernecky, tomas.pernecky@aut.ac.nz, +64 9 921 9999 ext. 6764

Concerns regarding the conduct of the research should be notified to the Executive Secretary of AUTEK, Kate O'Connor, ethics@aut.ac.nz, 921 9999 ext 6038.

Whom do I contact for further information about this research?

Researcher Contact Details:

Vladimir Antchak, vladimir.antchak@aut.ac.nz

Project Supervisor Contact Details:

Dr. Tomas Pernecky, tomas.pernecky@aut.ac.nz, +64 9 921 9999 ext. 6764

Approved by the Auckland University of Technology Ethics Committee on *type the date final ethics approval was granted*,
AUTEK Reference number *type the reference number*.

Appendix 3: Consent Form

Consent Form

For use when interviews are involved.

*Project title: **Event portfolio design: Exploring strategic approaches to major events in New Zealand***

*Project Supervisor: **Dr. Tomas Pernecky***

*Researcher: **Vladimir Antchak***

- I have read and understood the information provided about this research project in the Information Sheet dated 15 August 2014.
- I have had an opportunity to ask questions and to have them answered.
- I understand that notes will be taken during the interview and that they will also be audio-taped and transcribed.
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- I agree to take part in this research.
- I agree to be identified by my position in this research (please tick one): Yes No

*If your answer is **NO** the researcher will use only generic position titles in his notes and records. However, it is possible that responses may be attributable to individual participants because of the small pool of potential participants relevant to the study. Therefore, you could be identified in connection with the area of business and the nature of your role.*

- I agree to be informed regarding the progress of the research (please tick one): Yes No
- I wish to receive the transcripts of my interview for revision and comments (please tick one): Yes No
- I wish to receive a copy of the report from the research (please tick one): Yes No

Participant's signature:

.....

Participant's name:

.....

Participant's Contact details (if appropriate):

.....

Date:

*Approved by the Auckland University of Technology Ethics Committee on 15 August 2014 AUTEK
Reference number 14|213*

Note: The Participant should retain a copy of this form.

Appendix 4: Interview guide

Themes\Questions for semi-structured interviews (Auckland case)

Segment ONE. Introductory questions

Position, organisational chat, stakeholders

1. Could you please describe your position? What roles and responsibilities do you hold in relation to city events?
2. Whom do you see as key event stakeholders in the city? What is their involvement in the process of decision-making?
3. How do you communicate with other stakeholders with regards to the city events planning and management? Are there any official protocols, periodic meetings, etc.?

Segment TWO. General questions

Definitions, current portfolio, city objectives

4. In my research, I am going to use a special term 'Portfolio of Events'. If we say 'Portfolio of events in Auckland', how can you define and describe it?
5. Could you please describe the general allocation of responsibilities between ATEED and City Council in relation to management of local, regional and major events (Event Policy)?
6. According to the Major events classification matrix there are mega, anchor, and niche events. How would you define mega events, niche events?
7. Why is it important for Auckland to host and financially support events? What are the factors that determine this city vision?
8. What is the rationale of hosting one-off, usually sports, events in the city? What are the challenges? How do you see such events fit the structure of the portfolio?
9. In Major events strategy a special attention is given to anchor events. The goal is to have eight anchor events in 2021. How do you identify anchor events? Are there any strategies which ATEED use to find these events (monitoring the wider landscape) and evaluate their potential?
10. What does it mean to be 'distinctively Auckland'? Maori identity is described as the Auckland's point of difference in the world. How exactly this identity has been used in events to showcase Auckland? In what way do events tell the 'story' of the city?
11. There is an opinion that Auckland has an outcomes driven approach. ATEED selects events on the base of four key outcomes. But what about a city

community in general? Do common people, tax payers really demand/need these pure economic outcomes? They need events to have a good time, to celebrate, to enjoy their lifestyle... Blockbuster travelling exhibition... Isn't it a imbalance in the key outcomes stated in Major events strategy?

Segment THREE: Questions of Greater Specificity

Criteria, factors, decisions, selection procedures

12. What criteria should an event meet to be included into the city's portfolio of major events?
13. Could you please describe and explain the key stages of selection of major events for the portfolio?
14. From your perspective, what are the factors (internal and external) that determine the design of the current events portfolio/create obstacles in the planning? Is it possible to prioritise these factors? How would you do it?
15. How have key decisions on the total number of events, target markets or frequency have been made? What is the process? How do you identify the number of events in the portfolio?
16. How do you see the roles of separate events within the portfolio? (Screen play example). Is it just a list of events or a strategic plan? Is there a balance between different genres of events (sport and cultural, for example), their spread through the calendar, target markets? What could be done to improve the situation?

Management of events, leveraging

17. Can you recall any and describe some of the organisational/managerial challenges that have affected the management of the current event portfolio in the city?
18. What has been done in the city to capitalise on events' benefits? Do you have any specific event legacy or leverage plans? How do they work?

One-off events and their relationships with the portfolio

19. What are the impacts of one-off major events on local and regional events in Auckland?
20. What changes, if any, have been made/are usually made in the portfolio in order to host a particular one-off event? (e.g., change of the dates, funding rationalising, cancellation of some events, change of priorities). How will FIFA U-20 affect the portfolio?

Segment FOUR: Revisiting the interview

21. Do you feel that the current portfolio of events is a success? What could have been done better or another way?
22. Do you have any other comments/suggestions regarding the planning and development of the portfolio/calendar of events in the city?

Appendix 5: Portfolio of Major Events in Auckland, 2014-2015

Source: http://www.aucklandnz.com/images/uploads/page_images/events-calendar.pdf

Pan Pacific Youth Water Polo Festival

Various, 5-16 July 2014

The Southern hemisphere's largest water polo event.

New Zealand International Film Festival

Various, 17 July-3 August 2014

Premiere screenings of the latest and best of features, shorts, documentaries and animated films.

New Zealand Fashion Week

Viaduct Event Centre, 25-31 August 2014

Platform for New Zealand designers to promote their collections to the world and assist in the growth of their brand.

Auckland On Water Boat Show

Viaduct Harbour, 25-28 September 2013

The latest boats, engines, electronics and accessories for all things marine.

Auckland Diwali Festival of Lights

Aotea Square and Queen Street, 11-12 October 2014

Celebrate the most vibrant Indian festival with food, entertainment, dancing and crafts.

The Sound of Music

The Civic, 3-19 October 2014

The world's best loved musical.

Auckland Marathon

Various – CBD, 2 November 2014

This is Auckland's premier road race featuring a marathon, half marathon, 10km road race and 5km walk.

INF Fast5 Netball World Series

Vector Arena, 8-9 November 2014

Come and see the top six netballing nations tackle this brand new five-a-side game.

Taste of Auckland

Western Springs, 13-16 November 2014

Discover gourmet food, wine and beer from Auckland's leading restaurants and award-winning chefs.

Art In The Dark

Western Park, Ponsonby, 13-16 November 2014

Witness over forty light art installations ranging from projections, performances, installations and large scale immersive experiences.

The Rolling Stones 2014 On Fire Tour

Mt Smart Stadium, 22 November 2014

Legendary band back in Auckland for one concert only

Farmers Santa Parade

CBD, 30 November 2014

It's New Zealand's biggest and brightest Santa Parade.

Coca-Cola Christmas in the Park

Auckland Domain, 13 December 2014

A great night of free family entertainment to celebrate Christmas.

ASB Classic / Heineken Open

ASB Tennis Arena, 5-17 January 2015

See some of the top male and female tennis players on the planet as Auckland hosts the WTA and ATP Tours.

Ironman 70.3 Auckland Asia-Pacific Championship

Various – transition next to the Viaduct Events Centre, 18 January 2015

Distance triathletes from across the Asia-Pacific region compete on an iconic Auckland course.

Headland Sculpture On The Gulf

Waiheke Island, 23 January-15 February 2015

Considered New Zealand's premier contemporary outdoor sculpture exhibition.

Dick Smith NRL Auckland Nines

Eden Park, 31 January-1 February 2015

A two-day, nine-a-side, knock-out tournament extravaganza showcasing the world's greatest Rugby League talent live in Auckland

Auckland Pride Festival

Various, 21 February 2015

The streets of Auckland will come alive for the Auckland Pride Festival and Parade.

Splore Music and Arts Festival

Tapapakanga Regional Park, 20-22 February 2015

Outdoor summer music and arts festival. Where music art and culture meet.

Takapuna Beach Cup

Takapuna Beach, 20-22 February 2015

A three day outrigger race.

Auckland Lantern Festival

Albert Park and surrounding streets, 26 February-1 March 2015

Be enchanted by hundreds of outdoor lanterns and live performances to celebrate Chinese New Year.

Volvo Ocean Race Auckland Stopover

Viaduct Harbour, 27 February-15 March 2015

A yacht race acknowledged as the greatest test of sailing prowess and human endeavour.

ICC Cricket World Cup 2015

Eden Park, 28 February-24 March 2015

The international championship of one day international (ODI) cricket.

Pasifika Festival

Western Springs, 14-15 March 2015

The world's largest Pacific festival with traditional and contemporary entertainment, festive flavours and vibrant stalls.

Barfoot & Thompson ITU World Champs Series, Auckland

Various – transition on Queens Wharf, 28-29 March 2015

The first triathlon event in a series of eight making up the international 2014/2015 World Champs Series

NZ Badminton Open

North Shore Events Centre, 28 April – 03 May 2015

See top badminton over 5 days of intense world class competition.

ITM 500 Auckland V8 Supercars

Pukekohe, TBC 2015

Catch all the action from the V8 Supercars at Pukekohe Park.

NZ International Comedy Festival

Various, 24 April–17 May 2015

A showcase of performances by top local and international comedians.

Auckland Writers Festival

Various, 13-17 May 2015

The best domestic and international talent from the literary world.

FIFA U20 World Cup 2015

North Harbour Stadium, 30 May-20 June 2015

Auckland will host the opening match as well as a selection of pool matches, a quarter-final, a semi-final, 3rd/4th play-off and the final.

All Blacks Test Matches

Eden Park, August 2014 and June 2015

Blues Super 15 Franchise

Eden Park, ongoing.

New Zealand Warriors NRL Franchise

Mt Smart Stadium, ongoing.

New Zealand Breakers NBL Franchise

North Shore Events Centre/Vector Arena, ongoing

Appendix 6: Portfolio of Major Events in Wellington, 2015

Source: email correspondence with Respondent W2 and <http://wellington.govt.nz/events/past-major-events>

Ocean Swim Series - Capital Classic

25 January 2015

Open Water swimming competition.

Sevens Wellington

6-7 February 2015

Wellington Sevens is an annual rugby sevens tournament hosted on the central stadium in Wellington. It is the Wellington's largest sporting event, and one of the leading sporting events in the country.

Cuba Dupa street festival

28-29 March 2015

Cuba Dupa is a new street festival in Wellington that highlights and celebrates the creative spirit of Cuba Street and the Wellington community.

Wellington Jazz Festival

3-7 June, 2015

The annual music festival in the city.

Wellington Marathon

5 July, 2015

Wellington's running event.

Capital 150th celebration of 150 years as the capital city

25 July 2015

Celebration of 150 years as a capital.

Wellington On a Plate

14-30 August, 2014

The event showcases the region's food and beverage sector, and to develop culinary tourism in the region.

Beervana

14-15 August 2015

Wellington's craft beer festival.

LUX light festival

21-30 August

Free public light festival.

World of WearableArt Awards Show

8-11 October 2015

The World of WearableArt show combines fashion and art with dance, music and lighting.

Elton John

21 November, 2015

Concert

Hurricanes rugby season

Ongoing

Rugby season

Appendix 7: Portfolio of Major Events in Dunedin 2014-2015

Source: <http://www.dunedin.govt.nz/events>

Dundead

15-17 August 2014

Come behold the spectacle of the living dead as we make our slow piper lead way from the Railway station to the Town Hall to welcome the arrival of the I Survived a Zombie Holocaust Premier with Live music and fireworks.

The Otago Festival of the Arts

10th – 19th October 2014

A boutique arts festival of music, theatre, dance and visual arts.

International Festival of Historic Motoring

15-24 January 2015

Showcasing a huge array of the best Vintage, Veteran and Classic motoring vehicles from around New Zealand and overseas.

iD Dunedin Fashion Week

15-22 March 2015

iD Dunedin Fashion Week delivers an action packed eight days of outstanding fashion events. It features premier catwalk shows, international guests and iconic New Zealand designers.

Otago Rally

April or May 2015

The first round of the New Zealand Rally Championship.

Dunedin Writers and Readers Festival

May 2015

Features an incredible line-up of international and national authors.

Dunedin Fringe Festival

12-22 May 2015

The Dunedin Fringe Festival is the world's southernmost festival of its kind. Initiated in 2000, Dunedin Fringe aims to bring experimental contemporary art to a wider audience and to support the work of emerging artists.

Dunedin Mid-Winter Carnival

20 June 2015

This event marks the winter solstice with beautiful displays in the city's heart.

NZ International Science Festival

July 2015

Discover the multitude of sides to science, technology and the environment.

Dunedin Cadbury Chocolate Carnival

11-17 July 2015

Celebrates every aspect of chocolate - the science, the decadence, the fun!

Port Chalmers Seafood Festival

26 September 2015

The sights, smells, sounds and flavours of the Otago region will once again descend on the vibrant Port Otago.

Vogel Street Party

10 October 2015

Come and explore the Warehouse Precinct. The events, exhibitions and activities this year will follow the themes of literature and light and showcase the talent and creativity we have hidden in our humble city.

Appendix 8: A list of the key public documents

Auckland			
Auckland's Major Events Strategy	2010	An official city document that establishes a strategic approach to major events.	https://www.aucklandnz.com/downloads/MajorEventsStrategy.pdf
Auckland's Major Events Protocol	2013	This document regulates the relationships between different stakeholders within major events industry in Auckland.	http://www.aucklandnz.com/images/uploads/page_images/Major_Events_Protocol_2013.pdf
Auckland Council Events Policy	2013	An overarching city policy which regulates events sphere in Auckland.	http://www.aucklandcouncil.govt.nz/EN/newseventsulture/communityfundingsupport/Documents/aucklandcouncileventspolicy.pdf
Auckland's Business Events Plan	2014	A strategic plan for developing and staging business events in Auckland.	http://www.aucklandnz.com/images/uploads/page_images/Aucklands_Business_Events_Plan_FINAL.pdf
Auckland's Economic Development Strategy	2012	A general strategic vision on the city's economic development.	http://www.aucklandnz.com/images/uploads/page_images/economic-development-strategy.pdf
Auckland Visitor Plan	2014	A strategic plan to maximise benefits from tourism and foreign investments.	https://www.aucklandnz.com/downloads/Auckland_Visitor_Plan_2021_-_September_2015_1.pdf
Positioning Auckland as a Major Events Destination	2008	An earlier attempt to develop a strategic vision on major events and their impacts.	http://files.campus.edublogs.org/cal/edonianblogs.net/dist/a/14/files/2009/08/Positioning-Auckland-as-a-Major-Events-Destination.pdf
Statement of Intent for Auckland Tourism, Events	2013	A documents that introduces strategic directions and performance measurements for ATEED.	http://www.aucklandcouncil.govt.nz/en/aboutcouncil/representativesbo

and Economic Development Ltd (ATEED) 2013-2016			dies/cco/documents/ateedstatementofintent20132016.pdf
2015-2016 Major Events Sponsorship Guidelines	2015	This document regulates the application process for major events sponsorship.	http://www.aucklandnz.com/images/uploads/page_images/DEST449_Guide_to_Major_Event_Sponsorship.pdf
ATEED Annual Reports	2011-2015	The reports analyse and measure the results of ATEED's operations and initiatives.	http://www.aucklandnz.com/ateed/annual-reports
Wellington			
Wellington Events Policy	2012	An overarching city policy which regulates events sphere in Wellington.	http://wellington.govt.nz/~media/your-council/plans-policies-and-bylaws/plans-and-policies/a-to-z/eventspolicy/files/2012-05events.pdf?la=en
Wellington Visitor Strategy	2015	This document creates a framework for growth in the city tourism sector.	http://resources.wellingtonnz.com/products/wellington-visitor-strategy-2015
Wellington City Council Event Strategy	2003	The first attempt to develop a strategic vision on major events in the city.	http://wellington.govt.nz/~media/your-council/plans-policies-and-bylaws/plans-and-policies/a-to-z/eventstrategy/files/2003events.pdf
Wellington Towards 2040: Smart Capital	2011	The strategy focuses on the development of Wellington over the next 30 years.	http://wellington.govt.nz/~media/your-council/plans-policies-and-bylaws/plans-and-policies/a-to-z/wellington2040/files/wgtn2040-brochure.pdf
Wellington City Economic Development Strategy	2011	The document defines strategic directions for economic development of Wellington.	http://wellington.govt.nz/~media/your-council/plans-policies-and-bylaws/plans-and-policies/a-to-

			z/economicdev/files/economic.pdf?la=en
Wellington City Council Arts and Culture Strategy	2011	The strategy provides a direction for the Council's investment, asset management and staff resources that support arts and cultural activity.	http://wellington.govt.nz/~media/your-council/plans-policies-and-bylaws/plans-and-policies/a-to-z/artsculture/files/artsculture-strategy.pdf?la=en
WREDA Statement of Intent 2015-2018	2015	A documents that introduces strategic directions and performance measurements for WREDA.	http://wellington.govt.nz/~media/your-council/wreda/wreda-soi.pdf
Dunedin			
Dunedin Festivals and Events Strategy	2009	An overarching city policy which regulates events sphere in Dunedin.	http://www.dunedin.govt.nz/_data/assets/pdf_file/0004/132754/Events-Festival-Strategy-2009_11.pdf
Dunedin Visitor Strategy	2008	The strategy creates a framework for growth in the city tourism sector.	https://www.dunedin.govt.nz/_data/assets/pdf_file/0019/132751/Visitor-Strategy-Aug-2008.pdf
Dunedin Social Wellbeing Strategy 2013-2023	2013	The strategy provides a framework for the strategic direction of the Dunedin City Council with regard to social wellbeing of the city community.	http://www.dunedin.govt.nz/_data/assets/pdf_file/0007/274255/Social-Wellbeing-Strategy.pdf
Dunedin City Council Grants Policy	2014	The document regulates the distribution of the city council's grants.	http://www.dunedin.govt.nz/_data/assets/pdf_file/0006/487257/Grants-Policy-2015.pdf
Dunedin City Council Annual Reports	2009-2014	The reports analyse and measure the results the Council's operations and initiatives.	http://www.dunedin.govt.nz/your-council/council-documents/policies/annual-reports
National context			
New Zealand Major Events Strategy	2004	The strategy establishes a national strategic approach to major events.	http://www.majorevents.govt.nz/pdf-library/nz-major-events/strategy-

			documents/major-events-strategy-2004.pdf
Operation of the Major Events Development Fund. Evaluation Report	2007	The evaluation of the operation of the Fund, and the efficiency and effectiveness of the strategy underpinning it.	http://www.majorevents.govt.nz/pdf-library/nz-major-events/strategy-documents/evaluation-Major-Events-development-fund-2007.pdf
Cabinet Paper: Changes to the Government Approach to Major Events	2009	This document his approach outlines a shift in government's role from being seen mainly as a source of operational funding for events to becoming an integral partner with the events sector.	http://www.majorevents.govt.nz/pdf-library/nz-major-events/strategy-documents/changes-to-governemnt-approach-event-policy.pdf