

MAJOR EVENTS PROGRAMMING IN A CITY: COMPARING THREE APPROACHES TO PORTFOLIO DESIGN

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Event portfolio design is increasingly important from both academic and industry perspectives. The purpose of this article is to discuss and conceptualize the strategic process of event portfolio planning and development in different urban contexts in New Zealand. A qualitative multiple case study was conducted in three cities: Auckland, Wellington, and Dunedin. Primary data were collected by interviewing city event planners from city councils and relevant council controlled organizations. Secondary data were obtained by the analysis of the relevant documents, including city event policies and strategies, annual reports, statements, and activity plans. Thematic analysis revealed the existence of distinctive portfolio approaches in the studied cases, which can be compared and differentiated by applying the following parameters: Formality, Intentionality, Directionality, and Rhythmicity. Together, these parameters represent a “built-in equalizer” that can be used to balance the opposing values of diverse approaches and adjust them within current city objectives. The article provides a rich and broad context, which enables an understanding of the strategic nature of event portfolios and their implementation within a wider city development agenda.

Key words: Event management; Event policy; Event tourism; Major events;
Portfolio of events; New Zealand

Introduction

Conceiving major events as a means to develop and enhance local prosperity, some cities have been increasingly creating and staging a kaleidoscope of sporting, cultural, and arts events. Events now play an integral role in creating visibility and attracting

attention to cities by transforming their fabric into a performance place (Bevolo, 2014). The event policy domain contextualizes events at a macrolevel to enable the exploration of the prerequisites for event-led policies and the effects of these policies on cities (Foley, McGillivray, & McPherson, 2012). Events that planned to deliver specific outcomes

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and achieve clear goals, set by a host city, require a strategic managerial approach where all the interested stakeholders align their goals and behavior to a common strategy (Getz, 2013).

This unity of intention can be achieved by implementing an event portfolio approach, whereby a strategic alliance of events with city resources, city objectives, and overall host community capacity and capability is established (Getz, 2013). An event portfolio represents a managed grouping of different events for different target audiences, held at different locations within a host city, to achieve stated goals and objectives (Getz, 2013). Event portfolio planning and development involves the analysis of a number of critical factors, including local resources, market demand, and competition between different events (Ziakas, 2014b). The decisions that influence the compositional structure of a portfolio, including frequency of events, calendar placement, and total number of events in a portfolio should also be taken into consideration (Ziakas, 2014b). A set of strategies that utilize events for well-formulated purposes in the areas of tourism, urban redevelopment, and investment attraction need to be devised as well (Getz, 2012).

Researchers and practitioners increasingly consider an event portfolio as a strategic asset for event and tourist destinations. This asset can be utilized to amplify visitation, to diversify city tourism and event product, and to realize long-term legacy and leveraging plans. What is lacking in the current discourse is the empirical analysis of diverse local contexts, including sociocultural and political background, institutional structures, and their influence on the nature of applied portfolio strategies.

This article seeks to fill this gap by investigating the decision-making environment and the peculiarities of event portfolio formation in three cities in New Zealand: Auckland, Wellington, and Dunedin. The key research objective is to explore the commonalities and differences that exist in the public sector, focusing particularly on the institutional and community contexts and their influence on the realization of event portfolio approaches.

Events Within Public Policy Discourse

There has been a significant shift in the way events are understood, studied, and used by various

stakeholders. The emergence of events studies signals that events are no longer seen solely as economic drivers but as a means of furthering social, cultural, and political agendas (Pernecky, 2016). A particular focus for event scholars is the relationship between an event and its host city. As Smith (2016) argues, events frame and reframe the city “as a site of play and consumption” (p. 35), drawing attention to its space, culture, and people. Seeing major events as one of the contributors to city livability, visitability, and overall prosperity, cities have been increasingly creating and staging events of different genres in order to secure and maximize positive outcomes.

In many cases, cities have adopted a “stage it and they will come” maxim (Richards, 2015) 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. A different approach is the so-called “copycat syndrome,” whereby cities, in an attempt to compete with other destinations, copy events, bid on or borrow “already-branded” large-scale events, but without any strategic understanding of their feasibility and long-term value (Richards, Marques, & Mein, 2014; Richards & Wilson, 2004). However, both of these strategies are ineffective and pose major risks.

Indeed, critics argue that decisions underpinned by such policies and planning lead to hosting events by the right of bidding or buying, which instigates large costs for the host city, and with questionable legacy and value (Getz, 2013; Hall, 2012). More importantly, not every destination is equipped to host large and mega-events. In contrast, locally organized smaller events often use existing facilities and do not require extensive investment (Smith, 2012).

Planning of public events requires events to be linked with the cultural, social, and economic local context (Richards & Palmer, 2010). 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 thinking more strategically and proactively about event programming. The concept of “eventfulness” emerged to accumulate strategic considerations with regard to a consistent way of utilizing 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 of 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 city 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 the city's strategic planning, being interlinked 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 target market and, from this perspective, can be seen as a competitive feature of the host place. In this instance, a well-directed public policy towards events plays a constitutive role.

Developing a Sustainable Public Policy in Events

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) argued that, from the perspective of an eventful city, strategic decisions should be based on a city's vision, stakeholder relationships, event programming and marketing, monitoring outcomes, and overall sustainability of a local event program.

Getz (2009) further added 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, social, and environmental measures. Therefore, the emerging discourse on sustainable event policy calls for a holistic approach where events ought to be analyzed in a wider context.

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. It describes the organization's capacity to create value, issues, and processes in economic, social, and environmental domains to minimize any harm from its activities (Elkington, 1998). Richards and Palmer (2010)

extended the TBL model to cover additional dimensions of corporate governance and event capacity. Corporate governance evaluates the representation of stakeholders in decision-making bodies, whereas event capacity refers to the development of event facilities, organizational capacity, and "learning capacity" of the city that will lead to effective growth and development of its eventfulness.

Whitford (2009) suggested a planning framework to provide local governments with a constructive ground for the development of a coordinated and sustainable 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 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 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 should have a capacity to facilitate destination development, attract new investments and tourists, and satisfy local residents.

Implementation of an effective event policy requires collaboration, coordination, and partnership among different stakeholders, including organizing and supporting boards, public sector bodies, community groups, and volunteers (Ziakas, 2014a; Ziakas & Costa, 2011). These institutions and organizations comprise a policy network (Weed, 2001; Ziakas, 2014a) that deals with the sectoral issues and determines the direction of the event industry development in a city. Stokes (2008) further distinguishes corporate, community, and synergetic

frameworks for decision making and stakeholder involvement in event tourism. Each of the frameworks entails different organizational 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 usually driven by economic indicators. 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 organized and decisions are based on a wide spectrum of impacts, including social, ecological, cultural, and economic outcomes. Priority is given to fostering new and supporting existing local events and festivals.

The synergetic framework 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 development, the discussed frameworks can be treated as a spectrum of configurations that can be applied by cities at different stages of their event industry development. One of the ways to benefit from this spectrum and to adjust an event policy to the current needs of a city is to develop portfolios of events that could be viewed as a “strategic opportunity that can promote joint tactical planning and enhance mutual relationships in order to accomplish multiple policy purposes” (Ziakas, 2014b, p. 338).

Towards an Event Portfolio Approach

The event policy domain, discussed in the previous subsection, provides a strategic context for the planning and development of event portfolios in cities. A portfolio of events switches the focus from single events and their relationships with the

host place to a strategic grouping of events and portfolio synergetic values. The portfolio is capable of satisfying all the “pillars of sustainability” (Raj & Musgrave, 2009, p. 5) and provides a common ground for uniting different stakeholders. It also enables the usage of an integrated set of event-related resources for a long-term perspective (Ziakas & Costa, 2011).

Current literature demonstrates an increasing demand for the development of comprehensive event portfolio frameworks in order to better understand the key processes of portfolio planning and management. Cities can choose different portfolio strategies according to their current policy agendas, economic, and sociocultural goals. Dragin-Jensen, Schnittka, & Arkil (2016), for example, suggested 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 portfolio centers on diverse but local small-scale events.

In event tourism, Getz (2013) proposes three scenarios for portfolio development. In the first scenario, the portfolio is managed to achieve immediate, maximum tourism and economic gains. It appeals to destinations that are just entering event tourism and tends to put their names on the international event map. The second scenario deals with a portfolio that is managed for long-term strategic outcomes and sustainable urban development. The third scenario is when a portfolio focuses on niche audiences rather than on mass tourism or mass consumption of 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 prioritize music and cultural festivals (Smith, 2012).

Viewing portfolios as key contributors to the sustainable development of host destinations, Ziakas (2007, 2013, 2014a) proposed a holistic framework for event portfolio design. The framework includes strategic decision making on the selected events, taking into account a number of factors that impact

on the event portfolio success. These include local resources, market demand, and competition among different events and contingency, which entails environmental and socioeconomic changes or unexpected incidents (Ziakas, 2014a). Importantly, events included in a portfolio can play various roles. A host community can use events as: (1) core attractions and vehicles for tourism development; (2) as focal celebrations to generate community development; and (3) as complementary features to add value, enrich recreational options, and act as catalysts for development (Ziakas, 2014a). In addition, 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).

The composition synergy of an event portfolio is shaped by the cultivation of several event characteristics, including formality, replicability, intentionality, polysemy, and connectedness (Ziakas, 2014a). Formality refers to the extent to which standardized operating procedures, rules, or policies are put in place. This can help with the efficient cooperation and coordination of the event portfolio. Replicability signifies the replication or imitation of successful event elements within the portfolio in order to guarantee permanent success. Intentionality refers to the extent to which all the procedures, activities, and portfolio scope are strategic and intended to achieve certain objectives. Polysemy 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 (Ziakas, 2014a).

The frameworks described above represent a significant contribution to the ever-growing body of knowledge about portfolios of events. However, their key limitation is that they are generally focused on the characteristics and types of events to be included in the portfolio. The frameworks propose various compositional structures for portfolios, but do not suggest any strategies and operational procedures of the portfolio design.

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 prioritized, 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 context-based and process-oriented portfolio approach. Ziakas (2014a) argued that such approach should incorporate design, management, and leveraging of an event portfolio and aim to develop balancing mechanisms among all the principles of sustainable development, including sociocultural, economic, and environmental outcomes.

This research argues that local context plays a critical role in the development of the portfolio approach. More specifically, by identifying local needs and opportunities as well as external forces that might influence the portfolio nature (e.g., political, economic, legal, or environmental issues), city event planners could design portfolios that would reflect the unique and authentic conditions of a host destination. There is still insufficient research that is focused on examining local settings and public processes, which may determine the development of event strategies and portfolio approaches (Antchak, 2017; Clark & Misener, 2015; Dragin-Jensen et al. 2016; Ziakas, 2007). Local institutional and community contexts where portfolios operate should be holistically scrutinized in order to understand the complexities of event-related processes in cities and their unique set of developmental needs that a portfolio of events might be able to satisfy.

Research Design and Methods

Critical realism, pragmatism, and a qualitative multiple case study approach have been considered as the most suitable “interpretative framework” (O’Reilly & Kiyimba, 2015) for this research project. A critical realist position seeks to understand and explain real world phenomena (Maxwell, 2012). With regard to event portfolios, these are considered to be socially constructed but also real entities that have a cause and effect. Importantly, there can be multiple perceptions and understandings of these phenomena depending on different contexts (Maxwell, 2012; Sayer, 2000).

Supporting the critical realist postulate that understanding of any real phenomena is never certain and

is subject to revision (Maxwell, 2012), pragmatism views the process of knowing as the mode of experience that supports human actions. Pragmatism is rooted in pluralism and calls for the development of useful knowledge that facilitates problem solving in different circumstances (Hickman, 2009; Powell, 2001). This is particularly important to recognize concerning event portfolio design as every city has a unique set of attributes, which determine the most appropriate strategy for implementation.

A multiple case study methodology (Stake, 2008; Yin, 2014) provides a solid basis for knowledge creation and transferability, involving analysis of multiple variations of event portfolios in different urban settings. Although one of the potential limitations of the case study methodology is that the research findings may not be easily generalized (Stake, 1995). Flyvbjerg (2011) challenged this view, arguing that “formal generalisation is overvalued as a source of scientific development whereas the ‘force of example’ and transferability are underestimated” (p. 305). Moreover, the obligation of a researcher in a case study is not always necessarily to generalize findings but to demonstrate the transferable potential of the results and their application in other contexts (Simons, 2009).

There are at least two ways in which the findings of this study can be transferred and applied in other contexts: a cross-case generalization and a concept generalization (Simons, 2009). In a cross-case generalization, common issues and themes may be identified and interconnections between them may be constructed. Thus, a general proposition across cases may be derived. This research suggests several comparative parameters of portfolio approaches identified in the cities under study. The description of the parameters derived from the

analysis of the collected data across the cases. This is an example of a cross-case generalization.

On the other hand, concept generalization suggests that constructed theories and concepts within one case might have equal significance in other contexts. For example, the suggested model of the parameters with opposing values (Fig. 1) could be applied and tested within different institutional and community contexts. Overall, case study research should not be evaluated in terms of the universality of the theory, but rather in terms of its contribution to contextual insights (Järvensivu & Törnroos, 2010).

The research methods included semistructured interviews with public event planners and document analysis. The researcher aimed to interview the representatives of the public-sector event agencies, council event divisions, city marketing authorities, and event advisers. The interviewees held senior event-related positions in their organizations, including City Event Manager, Event Design Manager, Senior Advisor, Head of Event Feasibility Team, Policy Planner, and Event Development Manager. In addition, in order to broaden the sample, several industry experts (CEOs of event companies) who had previously worked for city councils and council-controlled organizations and were involved in event portfolio design were invited to participate.

As the research goal was to understand and theorize the official city vision and strategic approaches to event portfolio design, other stakeholders not directly involved in decision making were not invited to participate in the research. Overall, 17 interviews were recorded, meeting the suggested requirements for the achievement of saturation in qualitative research (Guest, Bunce, & Johnson, 2006; McCracken, 1988). Public documents,

<u>Parameters</u>		<u>Opposing values</u>
FORMALITY	Standardised	Amorphous
INTENTIONALITY	Purposive	Unintended
DIRECTIONALITY	Market-led	Community-led
RHYTHMICITY	Intensive	Passive

Figure 1. Comparative parameters of the portfolio approaches (adapted from Ziakas, 2014a).

including city event policies and strategies, statements on intent, annual reports, visitor plans, major event protocols, and guidelines were selected and analyzed in order to complement the insights from the interviews. Such a wide spectrum of documentation helped to “uncover meaning, develop understanding and discover insights” (Merriam, 1988, p. 118). A systematic review of public documents served to ground the research in distinctive contexts in Auckland, Wellington, and Dunedin. Documents were also used for pre- and postinterview situations (Bowen, 2009) when the information from documents was used to check interview data and vice versa.

Thematic analysis of the collected data was carried out. The coding process entailed two circles of data exploration, namely, initial and pattern coding (Saldaña, 2013). The first cycle entailed initial coding of data, where interview transcripts and documents were broken down into segments. The task was to examine and compare emerged similarities and differences (Strauss & Corbin, 1998). A set of descriptive and in-vivo codes was created. The second cycle of pattern coding helped to categorize and transform initial codes into themes and categories (Miles, Huberman, & Saldaña, 2014). 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).

Manual and electronic techniques were employed to interpret the collected data. During the first stage, the data were coded manually, using the hard-copy printouts of the interview transcripts and documents. During the second stage, the results of the manual coding were summarized and uploaded to NVivo10. The software facilitated the construction of multiple hierarchies of codes and links between and across data segments. It allowed reconfiguration, mapping, and visualization of the results of the coding.

The findings were interpreted inductively. In other words, the meanings of the obtained data 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 analyzed data (Erickson, 1986; Trent & Cho, 2014).

Because the research was conducted in New Zealand, it 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; the study was considered as a mutual activity that involved coownership and shared power with respect both to the process and to the results of the research (Smyth, 2004). To guarantee confidentiality for the research participants, each interviewee 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 have been given in accordance with the order in which the participants were interviewed. 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 Cases: Auckland, Wellington, and Dunedin

Following replication logic (Yin, 2014), three cases were drawn—from Auckland, Wellington, and Dunedin (Table 1). 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 format of case presentation in Table 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.

To begin with, the cases can be compared in their size. Auckland is the largest city in New Zealand,

Table 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 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 realization 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 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 b. Similarities with Wellington c. Similarities with Wellington

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 programs of public events. It also affects the measures of event success and audience numbers. Although the cities are different in size, they all possess a “core” national status (Ministry of Business Innovation and Employment, 2012) in terms of economic, political, and sociocultural share.

The key institutional arrangements that affect the realization of major event strategies in Auckland, Wellington, and Dunedin relate 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 organizations has resulted in the amalgamation and integration of previously discrete destination management activities, including economic development, industry and business growth, investment attraction, tourism, and major events. Auckland and Wellington, in particular, demonstrate similarities in these criteria. The established semidependent public agencies, ATEED and WREDA, have been authorized to run and manage major events while city councils continue to plan and deliver smaller community and regional events. In the city of Dunedin, despite the establishment of Enterprise Dunedin (which deals with major events bidding initiatives), the city council events team is wholly responsible for the programming of all public events, including major, local, and regional.

Overall, the described organizations are expected to provide the cities with a strategic direction in terms of consolidation, manipulation, and negotiation within critical areas of city development, including economy, investments, tourism, and events. At the time of data collection in 2014, WREDA and Enterprise Dunedin had just commenced their activity, whereas ATEED had been successfully operated for 4 years.

The event policy framework in Auckland is notable for its well-developed pool of policies, strategies, and other regulations that guide the development of the event industry in the city. In

2010, Auckland Major Event Strategy (AMES) was created. This document set the pace for the development of a portfolio approach to large-scale public events in the city (Auckland Tourism, Events and Economic Development, 2011). Three years later, in 2013, Auckland Major Event Protocol (AMEP) was published to guide the process of major events selection and support and stakeholder relationship (ATEED, 2013); in the same year, Auckland Council published Auckland Event Policy (AEP). It explains the rationale for events planning and development, and justifies the involvement of Auckland Council in these activities. It also notes the roles and responsibilities of ATEED and local and regional boards (Auckland Council, 2015).

In contrast to Auckland, Wellington and Dunedin operate within a less-developed policy framework. In the city of Wellington, one single public document regulates the event sector—the Wellington Event Policy (WEP)—which was developed as part of a wider strategic plan, “Wellington 2040: Smart Capital,” in 2012. WEP emphasizes the role of major events as a key economic contributor. It also identifies 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).

In Dunedin, the only document guiding the strategic importance of events is the Dunedin Festivals and Events Strategy (DFES), released in 2009 (Dunedin City Council, 2009). Although the strategy was supposed to play a fundamental role in Dunedin’s public event sector, it has some significant limitations. For example, the stated targets and measures of success do not reflect the real situation in the industry and cannot be fully applied to any staged major events.

The identified parameters of replication logic provided this research with an expected variability in terms of major event programming and portfolio planning. The selected cases were likely to replicate or extend the emerged theorization (Eisenhardt, 1989) on event portfolio development in mid to large cities in New Zealand. The following section more specifically examines the different approaches in Auckland, Wellington, and Dunedin.

Findings and Discussion

The findings of this research suggest that there are three distinct approaches to portfolio design:

1. A strategic investment-oriented way of event programming in Auckland.
2. A “diverse minimum” approach in Wellington.
3. A “simplistic programming” of events in Dunedin.

In Auckland, a separate management of major events by a semicontrolled economic development agency, ATEED, determines the investment nature of the city’s portfolio of major events. Major events are treated as investment assets to deliver positive economic results (Antchak, 2017). A well-developed event policy framework including strategies, policies, and protocols center the approach on several economic and sociocultural outcomes. The approach involves aggressive bidding campaigns and hosting major events that could significantly contribute to the city’s economy and image promotion.

Event planners in Wellington utilize an approach that delivers a content-rich minimum of major events. The decision making is informed not merely by economic benefits, but also by cultural and social expectations. 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 is described as being “at its capacity.” The capacity is characterized by the content-rich and resource saturation.

The findings from the case of Dunedin indicate the existence of an ad-hoc nonstrategic approach to major events. A merged management of local, regional, and major events and a lack of clear policy guidelines determine simplistic programming of the event portfolio. Such an approach manifests itself in an absence of strong selection criteria and in a hereditary programming, where events have been included in the portfolio due to historically formed traditions, even if they do not meet current city objectives and expectations.

The characteristics of the approaches are further teased out by applying several parameters. These are Formality, Intentionality, Directionality, and Rhythmicity (Fig. 1).

Figure 1 shows a linear continuum of these parameters with opposing values at the ends. The

idea of the continuum was adapted from Ziakas’ (2014a) event portfolio design model where opposing values of events shape the composition of an event portfolio. In this research, two parameters, Formality and Intentionality, were adopted directly. Others, for example, Replicability, Connectedness, and Polysemy were not applied. These parameters describe individual characteristics of events and do not entirely fit the discussion of the identified approaches. Instead, Directionality and Rhythmicity were proposed.

The four identified parameters are used to explain the nature of the applied public strategies with regard to event portfolio development:

1. Formality refers to the level of standardization of portfolios, operating procedures, protocols, and rules. The opposing values of Formality are “standardized” and “amorphous” (Ziakas, 2014a).
2. Intentionality determines to what extent portfolio approaches and initiatives are strategic and intended to achieve certain outcomes; the opposing values are “purposive” and “unintended” (Ziakas, 2014a).
3. Directionality describes the orientation of the portfolio approaches either on the supply-side market-led initiatives or demand-side community engagement in portfolio design.
4. Rhythmicity refers to the ability of city event planners to modify their approach following context changes and revision of objectives, with opposing values being “intensive” and “passive.”

Parameter 1: Formality—From Standardized to Amorphous

The data analysis revealed opposing values for the level of portfolio Formality in two of the case study cities: a standardized approach in Auckland, and an amorphous approach in Dunedin. Wellington demonstrates a degree of fluctuation on the continuum—the process of formalization of the approach in the city is still under development due to institutional changes and the emergence of a new player—WREDA.

The level of Formality depends on the current stage of the major events industry development in a city. A separate management of events by a specific agency, as in the case of Auckland, leads to a formalized approach to major events programming.

The event portfolio is viewed as a strategic grouping of events, where each event is expected to deliver certain outcomes and contribute to the overall purpose of the portfolio. As noted by A3: “We support events that have a potential to deliver our outcomes. And that is how they become a part of our portfolio.” The four outcomes stated in AMES include increase in visitor nights, economic growth, high international media profile, and overall city livability (ATEED, 2011). An orientation towards these outcomes distinguishes between a portfolio of major events and a program of local and regional events run by Auckland Council.

A developed event policy framework in the city of Auckland, which includes AMES, AMEP, and AEP provides event planners with a standardized toolkit for creating, managing, and evaluating the portfolio:

I think that the strategy itself, the development of the strategy, the execution of the strategy has also made it easier to operate. It gives us some very clear direction. . . . The fact that we have a guiding document and that we ally consistently means that expectations of stakeholders are managed and the expectations of the industry are managed. (A1)

The evidence from the Auckland case supports Ziakas’ (2014a) argument that established policies and written rules facilitate the efficient operation and coordination of the event portfolio. On the other hand, the negative side of the high degree of formalization is the loss of creativity and authentic character in the portfolio (Ziakas, 2014a). Indeed, the strategic nature of Auckland’s approach primarily manifests through the aggressive bidding for and staging of one-off events that bring new visitors and economic benefits, but that do not reflect any local authentic meanings and traditions. Getz (2013) argued that such an approach is characterized 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 of the Auckland’s portfolio transforms it into an investment mixture where a positive return on investment is the only acceptable and desirable objective.

A “diverse minimum” approach in Wellington guarantees the development and hosting of a basic number of major events that showcase Wellington as a cosmopolitan, creative, and artistic city. Prior

to the establishment of WREDA, an event portfolio had been viewed as a composition of different events, rather than a strategic grouping of investment assets. This composition included all events, of any kind, supported by WCC; however, major events had strategic priority in terms of financial support and allocation of other resources.

Although the level of Formality in Wellington’s case is not as strong as in Auckland, the available written protocols, funding rules, and WEP provide sufficient regulatory standards to run the approach. The spontaneity, creativity, and authenticity of the portfolio appear in the symbiosis of small community, regional, and large events that are managed by the same team within the City Council. The diversity of events and general management enables the city to accomplish strategic objectives both for community satisfaction and overall city development:

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 changes in the institutional structures and the creation of WREDA could affect the levels of Formality towards the standardized end of the linear continuum. A new agency provides opportunities to “make a significant change in how the events business is approached and planned in the Wellington region” (WREDA, 2015, p. 24). These include economic assessment of events in the region, the development of integrated event programs, and an audience development plan. City authorities start treating major events as an element of joint city strategies to increase tourism and the economic prosperity of the city. However, the discussed negative aspects of Formality, such as loss of spontaneity and creativity should be taken into consideration as they might influence the overall success of a new portfolio in Wellington.

In contrast to Auckland and Wellington, the approach to major events in Dunedin is much less formalized. The merged management of events, where major events have been planned and delivered together with other local and regional events by the same team, creates a situation where “portfolio” semantically refers to the overall listing of events 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)

Although Dunedin obtains some elements of the portfolio approach, including visioning events as contributors to its prosperity, the evidence shows a lack of strategic direction in the city's events industry. This generally confirms the findings of previously conducted studies about portfolio design in small urban and rural communities (e.g., Clark & Misener, 2015; Ziakas, 2007). DFES has structured the funding procedures and regulated the relationships between key industry players in Dunedin, but it has not yet affected the programming process.

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 three cases reveals the existence of purposive strategy making in Auckland, maturing variation in Wellington, and a less deliberate Intentionality in Dunedin.

Auckland's portfolio approach can be described as a "blitz" strategy with a focus on immediate positive economic and reputational results (Getz, 2013). Auckland's ambitions to become the most livable city in the world (Auckland Tourism Events and Economic Development, 2011) drive city event planners towards a tactic of "quick wins" in hosting major events. The city event planners are overly focused on the delivery of economic and image outcomes, while community-oriented major events have been downgraded in their importance:

ATEED focused a lot of its attention initially on trying to get economic events. Generally, sporting events. They have gone probably too far, they need to get more balance, to focus more on those social events that meet social outcomes, those community events. (A4)

The nature of ATEED and its profit-making orientation affects the distribution of the city support for major events. Auckland's "blitz" approach

has successfully promoted the city as one of the leading event destinations in Australasia. However, a misbalance in the major events goals toward economic results calls for a revision of the approach and its reorientation towards community perceptions and expectations.

Recent changes in the institutional structure in Wellington have been 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 have been leaning towards the development of an Auckland-like portfolio Intentionality. WREDA would mainly focus on major events and their economic and image contribution. In fact, 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 proposes NZ\$5 million investment in major events in order to achieve a 1:20 economic return (Wellington City Council, 2015). It is evident that economic and business realities are becoming dominant in the major event public discourse in Wellington and change the vector of portfolio programming towards economic indicators of success.

The "simplistic" programming of major events in Dunedin was viewed by the interviewees as an ad-hoc approach where event planners have tended to do "what is easy to do" (D1). For example, a low level of Intentionality manifests itself in the absence of well-planned leveraging and legacy activities in the city. A shortage of available event funds limits the event planners in their desire to fill gaps in the current event program. A lack of strategic vision and the absence of clear guidelines have not allowed the city to capitalize on this city potential and industry competence. The ad hoc unintended approach is unlikely to provide the city with long-term advantages as there are no parameters to measure the successful achievement of desirable outcomes through a coordinated portfolio of events. The development of a sustainable portfolio requires the utilization of a more strategic process and a more significant level of Intentionality.

Parameter 3: Directionality—From Market Led to Community Led

Directionality refers to the direction of the decision-making process in the cities. In Auckland, the decisions with regard to the portfolio of major events are, in general, market led. Wellington is currently implementing a moderate type of directionality, whereas Dunedin applies a community-oriented approach with scant strategic regulation.

In Auckland, decisions are usually driven by market criteria, including attractiveness, growth, and economic resources. In a successful effort to secure quick economic benefits and outcomes from hosting major events, Auckland relies heavily on external event proposals. This makes the city significantly dependent upon external institutions and the event rights holders, whose requirements the city has to meet:

An organisation like ATEED is very dependent on events coming in from external agencies. The majority of events that ATEED would be involved [in] are run or underwritten by external agencies. There is very little control over the type of events that make up your portfolio. You can decide which one you are going to fund, which one you are not. But the city is really dependent on those external organisations that come and bring those events to you. (A4)

The desire to achieve a recognized international status of the most livable city push the city event planners towards already discussed “stage it and they will come” maxim (Richards, 2015). The negative effect of this approach is that local community is not actively involved in portfolio planning as decisions are made exclusively by an authorized agency, ATEED, which bids for and supports major events capable of delivering economic and image benefits.

The portfolio approach in Wellington meets the requirements of a synergetic strategy (Stokes, 2008). It is characterized by the utilization of integrated tactics for bringing new and supporting existing events. Decisions are both market and community driven when city event planners weigh up economic benefits alongside the social and cultural impacts of events. Wellington’s portfolio of major events is more oriented towards balancing genres and entertainment levels, rather than on purely investment

measures. However, previously discussed changes in institutional structures are likely to affect the balance in the decision making towards a market orientation for economic and image benefits.

The current event strategy in Dunedin somewhat corresponds to Stokes’ (2008) definition of a community, destination-led strategy. It is characterized by the involvement of the community in guiding and influencing the city event strategy. Interestingly, limited public resources and a lower level of Intentionality has inspired the local community in Dunedin to become a hub for event ideas and creative solutions. In this regard, interviewee D2 noted that “there are things that bubble up within Dunedin. . . . We have groups of people who are passionate about this.” Interviewee D1 expressed a similar observation: “We have a group of citizens getting together or organisations coming up with good ideas and pitching” (D1).

However, the amorphous formality and low intentionality of the current approach in the city do not provide the conditions for building an integrative community-oriented portfolio network that sustainably accumulates areas of city branding, economic development, and event industry. Community can play a critical role in portfolio planning, but it is unlikely to achieve a strategic synergy in the portfolio without clearly stated outcomes and standard protocols.

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 characterized as intensive and innovative, as the city event planners are able to monitor the development of the portfolio and refresh its composition. Around half of the events in the city have been selected through an annual contestable process, which guarantees the renewal of the event program. The city recognizes the strategic necessity of a periodic 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 events industry. 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 the collaboration of the key stakeholders. It relies 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 face a relative invariability in the portfolio rhythms due to having multiyear contracts with event organizers and promoters. This approach does not provide the necessary flexibility for event planners should any other advantageous event options arise:

We have multiyear 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)

A solution for this problem could be found in an “adding new elements” strategy:

An approach that we have been taken over the last couple of years is rather than creating a whole new event, can we look at an event that is already happening and add some elements into that so the Pasifika festival for example, next year, can we make an offer of a pacific island style cricket? We always should think about the target audience. (W2)

Adding new fresh elements to existing major events might be seen as a more sustainable approach to event planning in the city, as it allows the event planners to vitalize their event portfolio’s compositional structure using a minimum level of new expenditure and without supersaturating the major events offering.

In Dunedin, a relatively passive rhythmicity of the city portfolio was described as the overreliance on annual events. Interviewee D1 explained that in Dunedin many events were organized because “we have always done them.” Such orientation lacks critical evaluation of event feasibility and relevance for current city objectives. Event planners clearly emphasized the need for strategic changes and a more proactive intervention of city authorities into the major events.

Conclusion

Each of the portfolio approaches discussed in the article incorporates diverse financial, planning, and managerial tactics. The 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. It is unlikely to highlight any single winning strategy that would successfully regulate the opposing values of the suggested four parameters. The adoption of different strategies identified in this study should be congruent with the current city objectives and supported by the available resources and overall industry capability. The suggested parameters of Formality, Intentionality, Directionality, and Rhythmicity can serve as a guide for evaluating and modifying already existing strategic event portfolio initiatives in cities.

In terms of Formality, the findings demonstrate the advantages of developing an overarching event-policy framework in a city with clear objectives, targets, written rules, and protocols. Such a framework is based on an in-depth analysis of the existing situation with major events in the city, evaluation of relevant resources, facilities, and the industry capacity to plan and host events. However, high formality transforms the event portfolio into an investment mixture where a positive return on investment is the only acceptable and desirable objective. To balance the level of formality, event planners could 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 specter of social and cultural benefits.

Intentionality calls for a careful consideration and evaluation of the portfolio purposes. Both the amorphous and standardized ends of the continuum

discussed directly influence the degree of Intentionality. For example, strong formalization of the portfolio planning in Auckland determines its purposive intentionality and orientation on the achievement of stated outcomes, whereas case of Dunedin illustrates that absence of clear objectives leads to the unrealized opportunities in leveraging and legacy planning. Another requirement is to achieve a balance between economic and sociocultural purposes. It is imperative to consider the whole spectrum of experiences and benefits that major events are able to deliver. Thus, apart from the purely economic value of major events, attention should be paid to the social and cultural domains, in order to meet community perceptions and construct an authentic and sustainable portfolio.

With regard to Directionality, strategic decision making about portfolios determines the orientation of portfolio approaches towards either internal or external demands. Ideally, decisions should be driven by internal requirements as it would prevent city event planners from reacting to abruptly emerging opportunities on the event market. Moreover, the reactive variant does not provide cities with flexibility in event programming, when they can strategically search for desirable events and not simply adjust available offers.

The types of decision making and collaboration affect the levels of portfolio rhythmicity. The findings emphasize the need for periodical refreshment and change of event policies and approaches. Such revisions may include a review of direction, the statement of new goals, and an 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. The rhythm of an approach may lean towards the passive end of the continuum in order to prevent the potential risk from change, or it can become more intensive if opportunities to gain more positive outcomes appear.

As outlined in the methodology section, the findings of this research have been drawn from three cases in New Zealand. Further empirical research across different countries and cities could extend the scope of this article and further enhance the understanding of the portfolio approaching within different sociocultural, political, and historic contexts. Other opportunities for future research may

be found in the investigation of interorganizational relationships and event networks in different cities. The process of portfolio planning and development involves a wide range of organizations and institutions with their own interests and perspectives. Therefore, an exploration of the network relationships may reveal other important aspects intertwined with the parameters of Formality, Intentionality, Directionality, and Rhythmicity discussed in this study.

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