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Evaluating the social impacts of events: in search of unified indicators for effective policymaking

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ABSTRACT

Policymakers in destinations regularly struggle to identify effective ways to evaluate the impacts of planned events. Especially problematic is the relative lack of knowledge about the social impacts that planned events incur. This challenge is largely attributable to the historic focus on economic impacts. However, this trend is shifting along with the realization that events often fail to deliver on promised economic trickle-down effects.

This paper addresses the absence of a unified view on social impacts, and how this impedes destinations that aspire to work strategically with planned events. Policymakers at the destination level currently lack the common language needed to effectively measure these impacts.

We use a Delphi approach to pinpoint social impact indicators that are of use in policy settings. The results show six indicators that meet the study criteria, thereby contributing towards a unified set of indicators for dealing with strategic event management at the destination level.

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Introduction

For decades, communities ranging from major metropolitan regions down to small towns and villages have sought to build their brands and attract visitors by staging planned events of all types and sizes, ranging from mega events (e.g. World Expos, Olympic Games or the FIFA World Cup) to regional music festivals and youth sports tournaments. Today, bidding, staging, and managing events has become part-and-parcel of sound community development in many localities worldwide.

To be sure, planned events commonly play a vital role for the communities in which they take place (Bowdin, 2012). In addition to the perceived promise of economic benefits (Arnegger & Herz, 2016; Getz & Page, 2016a) they embody various social and cultural values both for event goers but also community residents (Chalip, 2006; Delgado, 2016; Schulenkorf & Edwards, 2012). The advent of mass tourism in the mid-1900s dramatically increased the potential of events to influence social and economic development in most localities (Getz, 2013). Thomas and Wood (2003) note that governments and

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Destination Management Organizations (DMOs) at local, regional and national levels increasingly have been turning to strategic event planning as a means of maximizing positive impacts for destination development purposes. In order to conduct strategic event planning it is necessary to access in-depth information concerning a destination's various events and the effects these have on the local community (Brown, Getz, Pettersson, & Wallstam, 2015; Wood, 2005). However, attempts at collecting information with this end in mind have so far been *ad hoc* in nature. This is symptomatic of the lack of agreement in and between destinations about what impacts are most important- and how they should be measured. Not least is this problematic for destinations, who aspire to strengthen their event offers and maximize the benefits they derive from these (Thomas & Wood, 2003). In a report emanating from the 'Sustainable Event Cities' development project (initiated by the national sports federation in Sweden), Getz (2017) outlined a key prerequisite of supportive destination environments as being the adoption of a standard approach of evaluation and legitimization of events in a portfolio. That particular project provides a clear example of a case where the lack of unified impact evaluation frameworks was declared a major obstacle to event sector progress. The project participants (the largest event cities and regions in Sweden as well as leading event researchers), whilst coming from different perspectives, all pointed to a lack of coordinated efforts at the regional and national levels with regards to evaluating and strategizing around events.

To this day, *ex-post* economic assessments have dominated event evaluation discourse. Subsequently, frameworks used to decide the merit of events in policy contexts have overwhelmingly targeted economic parameters (Dwyer, Mellor, Mistilis, & Mules, 2000). There is, however, a growing recognition concerning the need to better understand social impacts associated with events (Arcodia & Whitford, 2006; Brown et al., 2015; Fredline, Jago, & Deery, 2003; Kim, Jun, Walker, & Drane, 2015; Wood, 2009). Indeed, the inclusion of social values into policymaking was reflected by the attitudinal change in the 1990s when local authorities started to accept 'pleasure' as a formal objective in public sector intervention (Wood, 2005). This is not in the least important given the role that communities themselves play in the overall destination tourism product (Moscardo, 2014). In short, community inhabitants who are antagonized by poorly planned and disruptive events are likely to contribute to a negative experience for tourists who visit that community.

Current methods, measures and scales used to evaluate social impacts tend to be developed for, and focused on, case studies of singular events (Liu, 2016). At most, they are developed to capture social impacts within a specific genre, such as sporting events, instead of being adaptable to a variety of event types (Kim et al., 2015; Liu, 2016). The lack of comparability between studies means that this type of research primarily benefits the organizer of a specific event and is difficult to apply to a diverse range of events within a destination. As things stand, the utility of social impact data as a basis for private and public policy development could, therefore, be argued to be questionable.

Measuring resident perceptions is by-and-large the most common method used to gauge the social impacts of tourism and events (Ap, 1990; Gursoy, Kim, & Uysal, 2004; Jurowski, Uysal, & Williams, 1997; Kim et al., 2015; Liu, 2016). Perceptual studies generally adopt strictly quantitative approaches to evaluating social impact. Meanwhile, while some researchers occasionally utilize qualitative methods, their studies generally focus on the sociological dynamics of events (e.g. Fullagar & Pavlidis, 2012; Jaimangal-Jones, 2014) and less on implications for event management. For instance, Fullagar and Pavlidis'

(2012) ethnographic investigation relating to the experience of women in all-female cycling events provides a good illustration of an application of qualitative methods. In this case, the authors reached findings revolving around two central themes that were conceptualized respectively as that of 'body' (safety, comfort, enjoyment) and 'respect' (encouragement, skill and knowledge-sharing, self-actualization). Although there are some underlying theoretical frameworks that feature more prominently than others, social impact studies of planned events lack the theoretical clarity commonly associated with economic investigations. This, in turn, means that in social impact evaluations of events the results of such studies are limited in terms of being used as a basis for decision-making.

The overriding question here is: What exactly should be measured when we evaluate social impact for policy purposes? What should be measured is, in turn, directly derived from how we interpret the term 'social impact' in the context of events, and which of these impacts we judge to be relevant in policy. Not until this is firmly established can we develop the appropriate scales and measures for capturing these impacts. Therefore, we contend that there currently is no holistic take on social impact measurement with regards to events. Consequently, the scattered landscape of social impact studies impedes the development of useful evaluative tools that can be of value to practitioners and policymakers. In organizational terms, this lack of access to information arguably constitutes the biggest challenge to creating a long-term sustainable destination offer. Successful organizations in any sphere share a common need for effective information management. This is no less true in the case of destinations managing a portfolio of tourism products, services and planned events (Schianetz, Kavanagh, & Lockington, 2007). It is through this frame of organizational theory, organizational learning – and consequently, the 'learning destination' – that this paper draws from in framing the search for indicators.

To add clarity for practitioners, we believe that a clear definition of what is meant by 'social impacts of events' is necessary. Further, the quality and quantity of these social impacts should be readily testable in a variety of settings. For example, there should be standardized indicators for measuring the social impacts of events regardless of what these might be. In other words, one should be able to measure and compare the social effects of a sporting event to those of a cultural event or a festival. In the very least, this type of comparison between events would provide key knowledge enabling policymakers in a destination to engage in strategic decision-making. Having this knowledge, means that these actors would be better equipped to decide on which events to subsidize, which events to bid for and which events they should discontinue.

In this study, we assume that practitioners are constrained in terms of time and resources available to engage in developing new measures that are tailor-made for each new case that is to be evaluated. Indeed, Wood (2005, p. 38) highlights the importance of embracing a systematic evaluation in the management of entire portfolios of events: ' … if events are to be used strategically by local government then it is vital that information is gathered during and after each event in a systematic and objective way.' However, despite this recommendation there is currently no clear means by which places can fully leverage events towards more effective destination and community development (Getz, 2015).

In support of a solution to this problem is the aforementioned learning destination framework (Erkuş-Öztürk & Eraydın, 2010; Sadd, Fyall, & Wardrop, 2017; Schianetz et al., 2007). The learning destination is an inclusive and strategic approach that dictates the

need for collective learning processes in the destination. A cornerstone for collective learning at the destination level is the assemblage, dissemination and application of knowledge (Fyall, Garrod, & Wang, 2012; Sadd et al., 2017). In this paper, we argue that continual collective learning presupposes a common language with regards to the social impacts of events in a portfolio.

Here, in line with the aforementioned industry needs and knowledge gaps related to strategic event evaluation, we propose to further the theory on the learning destination by moving towards a consensus-based standard for evaluating the social effects of events. The objectives of this study are, therefore, as follows: to outline the ideal features of a utility-focused evaluation framework suited for event portfolios; in light of such a framework – to compile a list of indicators that capture the most critical aspects of social event impacts; through a consensus-based Delphi approach, explore which of these social impact indicators fit the study criteria; and to propose a mode of implementation for the resulting indicator set.

The social impact of events

Definitions, delineations and key concepts

In this study, we define social impact as any positive or negative change in peoples' lives affected by clearly discernable agents. Social impacts encompass everything from the conditions in which people live and their quality of life to their well-being and happiness. The social impact of planned events, therefore, sees the event as the agent affecting change in peoples' lives. The event consequently qualifies as the unit of study. Any phenomena occurring in and around this event as a result of its presence can, therefore, be used to gauge its impact. Thus, a phenomenon that is studied in order to gauge social impact can be termed a *social impact indicator*. These phenomena can either be directly indicative of a social impact (asking community members about perceived impact of the event on their quality of life), or be indicative by proxy (deciding how perceptions about crime levels indirectly affect the lives of respondents).

The discussion concerning *social impact indicators* becomes contentious in the case of the proxy indicators that arguably qualify under several headings. For instance, indicators such as employment opportunities (economic) or littering (environmental) have in some studies been considered social impacts given their role in influencing the perception of an event by residents (e.g. Fredline et al., 2003). We hereby acknowledge that indicators put forth in this study could be of this character, pending the input and opinions of the study participants. We thereby adopt an open interpretation as to the definition of *social impact indicators*, including anything that eventually *indicates* the impact an event has on the lives of people.

Whilst there are several concepts associated with social impacts, perhaps the most clearly discernable (and commonly occurring) in social impact studies are *quality of life (QoL)*, *subjective well-being* (SWB) and *social capital*. Versions of these impacts or proxy indicators relating to them can be found in almost every study on the social impacts of events. Although some studies mainly lean on proxy indicators and leave out discussion on the end impact, essentially all studies in some way touch upon one or several of the more fundamental concepts of social impact.

QoL is a commonly used term in social impacts studies, denoting the perceived conditions in which a person lives. A high quality of life will be characterized by the perception that one's position in life is on a par or above the level of that imposed by contextual community values and one's own expectations (Pfitzner & Koenigstorfer, 2016). Playing into quality of life are factors such as one's perceived access to work and healthcare, entertainment opportunities, wealth and general material standards, to name but a few.

Subjective well-being, or simply well-being, is also often described as a measurement of perceived happiness. SWB solely looks at a person's general sense of happiness (Pawlowski, Downward, & Rasciute, 2014). Although closely related, this needs to be distinguished from quality of life as they are routinely confused or interchanged. The distinction is most clear in that a person can have a low quality of life but feel happy. Conversely, a person can feel happy although their quality of life is low.

Social capital, made famous by the philosopher Pierre Bourdieu (1986), has been used in a variety of social impact research. According to Molitor, Rossi, Branton, and Field (2011, p. 749), the concept is operationalized in social impact studies as '*social relationships or networks and trust of others, often at the neighborhood or state level of analysis*' In other words, social capital helps us grasp the impact of an event on inter-personal relationships and group cohesion in the community. Authors such as Chalip (2004, 2006) consider social capital to be the principal way whereby events impact the communities in which they take place.

Perspectives on social impact

The theoretical framework underpinning a social impact study determines what perspective is taken, the data required to meet the demands of this perspective and the method of analysis employed to understand the data. Generally speaking, most social impact studies related to tourism and events are based on one of three constructs: *social exchange theory*; *social representation* or; *growth machine theory* (Deery & Jago, 2010).

To begin with, *social exchange theory* dominates most of these studies. It is based on the suggestion that we can measure large-scale social impacts by looking at the respective small-scale social exchanges between individuals and their surroundings (Ap, 1990; Emerson, 1976). In other words, 'community residents are likely to shape their event hosting perceptions from the expected value exchange prior to an exchange occurring' (Kim et al., 2015, p. 22). If community residents at a mega-event perceive the personal benefits (e.g. entertainment opportunities) gained from living in the host city to match, or outweigh, the personal costs (e.g. longer travel time to work) imposed by the event, then they are more likely to regard the overall social impacts of the event as positive.

Social representation is the second prominent framework commonly used in social impact evaluation. Social representation suggests that members of a society collectively create and share social knowledge. Studies applying this theory to events seek to understand the shared image that host communities create of external visitors or the event itself. However, Woosnam, Norman, and Ying (2009) argue that the use of social representation in tourism contexts is contentious, since it never really has been tested but merely used as a tool to 'guide' studies on social impacts.

Others have tried to utilize constructs, such as *growth machine theory* (Madrigal, 1995) but studies such as these are limited in use due to their perceived lack of applicability

amongst event and tourism researchers (Woosnam et al., 2009). Growth machine theory postulates that clusters of citizens, or 'nested communities', emerge in cities as a response to the local governments' use of power. Only by assessing the level of convergence or divergence of opinions towards tourism development between such clusters do we understand if governments are making socially sustainable decisions concerning tourism development. A city that bids for and hosts a socially unsustainable event will exhibit a large number of unhappy clusters and small number of very happy clusters. Conversely, social sustainability will be visible by a more even spread of opinions towards tourism development between clusters.

In our study we do not to focus specifically on any one of the aforementioned constructs but, rather, we purposely let indicators emerge free of such delineations. This is because the underlying aim is to develop a set of indicators that place the onus on end use over theoretical rigidity.

Evaluating social impact

The term *impact assessment* if often conflated with *evaluation* (Brown et al., 2015; Getz, 2015). Whereas evaluation historically involves ascribing value to an evaluand's outputs in relation to desired outcomes, assessment can be described as the act of gauging performance in order to improve a process (Brown et al., 2015). Nevertheless, the lines between evaluation and assessment are commonly blurred as evaluation literature has come to distinguish between *summative*, *formative*, *utility-focused*, *developmental*, and most recently, *principles-focused* evaluation (Patton, 2017). Although evaluation as found in event contexts usually is summative in nature, the formative and subsequent forms of evaluation arguably constitute forms of assessment. Indicators geared to inform destination policies can be considered formative in that they do not simply deliver judgement but rather tell policymakers how to improve and better balance an event portfolio.

Historically, investigations relating to planned events and their impacts have been informed by tourism studies. This tendency emanates from the strong theoretical links between the fields of event-and tourism studies, which are largely evident through the existence of literature on the specific phenomenon of event tourism (Getz, 2013).

The early focus on the economic impacts of tourism and events has gradually broadened given the increased emphasis on Corporate Social Responsibility (CSR) in public and private decision-making throughout the 1990s and early 2000s (Getz & Page, 2016a). This trend has dictated that companies and governments must take into regard the wider implications of their activities extending beyond mere economic impacts.

An important outcome of this shift has been the widely adopted TBL (Triple-Bottom-Line) impact taxonomy. TBL distinguishes between three forms of impact consisting of economic, environmental and social aspects (Brown et al., 2015; Getz, 2013). First coined by sustainability consultant John Elkington in 1994, this framework assumes that it is desirable to achieve positive outcomes within all three areas since they directly and indirectly influence each other (Elkington, 2008). For example, a short-term environmental cost in the form of air pollution, can translate into long term social and economic costs in the form of poor health amongst community residents.

Research on the social impacts of planned events reflects the shifts in these priorities. Deery and Jago (2010, p. 9) go as far as to declare that social impact studies of events have 'come of age'. These authors summarize the foci of previous social impact research as relating to: (a) constructing scales for evaluating social benefits and costs of events; (b) the study of the linkage between perceptions and resident support for events; and (c) the provision of recommendations to local authorities on how to improve social impacts.

Moscardo (2007) provides a clear typology of social impacts as seen through the lens of regional and community development. She puts forth the constructs of *social capital*, *community well-being* and *capacity enhancement* as a means towards understanding the fundamental impacts that events have on society. Whilst Moscardo helps us conceptualize the social impacts of events in the broader development context, Deery and Jago (2010) offer one of the most comprehensive typologies of indicators that can be operationalized to measure social impact (Table 1). Citing Fredline (2000) and Fredline et al. (2003), the list compiled consists of 22 indicators divided into positive and negative impacts.

The indicators presented by Deery and Jago (2010) provide an overview of the full range of social impacts, which a planned event could conceivably produce. We seek to pinpoint those indicators that are most universally applicable (in terms of event type and destination context) but also user-friendly. This means they have to be simple to comprehend and communicable for non-academics, including policymakers. Fulfilling these criteria would, in our opinion, make an indicator usable in strategic decision-making regarding events on the destination level.

Meanwhile, Sherwood (2007) offers a slightly alternative angle to the evaluation of event impacts. He assumes a TBL perspective, which seeks to standardize the economic, environmental and social indicators (Table 2) that are appropriate for use in iterative comparisons of events in event portfolios. Nevertheless, Sherwood's study falls short of addressing the user-friendliness for practitioners who wish to operationalize the indicators towards either destination management or public policy ends. His study finds four indicators of social impacts, all of which are measured on a seven point Likert scale. These consist of: *impact on sense of community*; *effect on pride in your community*; *impact on quality of life on the community as a whole* and; *impact on personal quality of life*.

Although established lists of indicators such as those highlighted in Table 1 are useful for conducting full-scale social impact evaluations of individual events, destinations have

Table 1. Social impacts of events on host communities.

Positive impacts	Negative impacts
• Increased employment opportunities	• Rowdy and delinquent behavior
• Increased standard of living	• Increased crime levels
• Increased entertainment opportunities	• Excessive drinking
• Economic benefits	• Litter
• Opportunity to meet new people	• Damage to the environment
• More interesting things to do	• Noise
• Enhanced community image	• Traffic congestion and parking problems
• Community pride	• Disruption of normal way of life
• Preservation of local culture/heritage	• Overcrowding
• Increased skill base	• Money spent on events. not on community needs
• New facilities and infrastructure	• Increased cost of living

Adapted from Deery and Jago (2010, p. 17).

Table 2. The second round statements presented for each proposed indicator.

Information about the indicator	Indicator name X Indicator description X Source of data X Type of data X
Statement 1	Data for the indicator can be easily and consistently obtained for all type of events.
Statement 2	Data for the indicator can be easily and consistently obtained in all types of destinations.
Statement 3	The indicator is useful and fair when making comparisons between events.
Statement 4	It is easy for practitioners and non-academics to analyze. interpret and communicate the indicator.

not, thus far, widely adopted these. This most likely stems from the fact that there is a variation in relevance of some indicators depending on the context they are being used in. In other words, some indicators that might be strongly relevant for one event might be insignificant in relation to others. On the one hand, for example, an indicator addressing noise pollution is likely to be highly relevant in the context of a music festival in an urban setting. On the other hand, applying the same indicator as a measure of social impact when it comes to a mountain bike race in a remote area is likely not as significant. Meanwhile, even though the indicators presented in Table 2 are better suited to account for the variation of scenarios in which different events occur they fail with regards to their practical relevance for developing and implementing policy.

Policymakers have yet to come up with a tool that could be used to comparatively evaluate the social effects of disparate events in a variety of destinations (Getz & Page, 2016b). This follows from the fact that these agents often do not share the same views as to what constitutes an impact, which impacts are important, and *especially* how impact evaluations (particularly social) should be used. As Briedenhann and Butts (2005, p. 1) aptly put it: '*… the importance of evaluation lies not only in its technical correctness, but also in how the evaluation results are used.*'

We decided to refer primarily to Deery and Jago (2010) as well as Sherwood (2007) for the purposes of our own study, given that their respective investigations proved most proximate to our needs. First, we selected Deery and Jago, because, at the time of writing, they were the ones offering the most thorough recent literature review on the social impacts of events. Therefore, their paper provides the most suitable available range of social impact indicators for our own investigation. Meanwhile, given that the ambitions reflected in Sherwood's thesis most closely match those of our paper, we also chose to refer closely to his work. This is despite his adoption of a Triple Bottom Line approach and the fact that he does not necessarily address end use. In our case, developing a set of indicators fit for use in event and event portfolio evaluations, meant that the best course of action was to look at the expertise that provided the closest fit. In effect we also minimize the risk of validity issues that might otherwise arise if using social impact studies designed for other contexts.

Utility-driven evaluation and 'the learning destination'

Sadd et al. (2017, p. 2) describe the need for systematic event evaluation at the destination level:

> *Although events can serve as a cost effective way of boosting the overall prosperity of a destination, event design and organization can be high-risk concerns and as such a suitable methodology is required to assist destination professionals in making informed decisions about the development, planning, and hosting of events.*

Currently, methodologies that could help destinations work transparently, systematically and consistently with event policies, are conspicuously absent (Brown et al., 2015; Sadd et al., 2017; Thomas & Wood, 2003; Wood, 2005; Wood, 2009). Getz (2015) describes how the subsequent fractured nature of forecasting and impact evaluations has been a major cause behind several challenges that hinder effective destination management. The confusion associated with measuring social impacts has, in many instances, obfuscated the process by which events are evaluated, leading certain event actors to exaggerate their impact values. The resulting inability to fully trust the validity of impact evaluations impedes policymakers at the destination in their ability to manage event portfolios and effectively leverage them in their broader tourism product (Ziakas & Costa, 2011a).

A recent construct adapted in destination management theory is that of the 'learning destination' (Sadd et al., 2017). The term originates in generic management literature on learning organizations. The idea behind this is simple. Effectively, any organization or entity that embraces habitual learning and adaptation, is more likely to be able to influence its own behavior and thus, in turn, improve performance (Harris, 1990; Slater & Narver, 1995). Both a destination-centric focus and collaboration in the form of knowledge and resource-sharing between local stakeholders characterizes a learning destination (Sadd et al., 2017). The learning destination framework goes hand-in-hand with the types of holistic event policies that contribute to broader regional development goals beyond those of destination management (Whitford, 2009).

According to Sadd et al. (2017), the learning destination adopts a 9-step collaborative approach to event evaluation. A critical phase in this process, involves the key stakeholders collectively determining evaluation objectives and determining which criteria are best suited to gauge the fulfillment of these objectives. This phase draws from the assumption that stakeholders involved share an understanding of what the objectives mean, whether the criteria actually address these objectives and what the purpose of the results are. Going through iterations of this process for every aspiring learning destination respectively could, therefore, mean that different destinations reach varying levels of success, based on the prior competencies and knowledge levels of the stakeholders involved in each respective case. Providing a universal vocabulary that holds relevance for all destinations engaging in this adaptive process might facilitate successful implementation of strategic event management initiatives. Not in the least is this the case for objectives and criteria created to address the social development of destination communities.

The learning destination assumes a portfolio perspective for the way events should be managed on the destination level. Ziakas (2010, 2013, 2014) as well as Ziakas and Costa (2011a, 2011b) have spearheaded the literature on event portfolios, defining them as:

> *… the strategic patterning of disparate but interrelated events taking place during the course of a year in a host community that as a whole is intended to achieve multiple outcomes through the implementation of joint event strategies.* (Ziakas, 2013, p. 14)

One of the principle tenets of event portfolio management is knowing, or having a clear inventory of, what events make up the portfolio, how they can leverage each other, and

how each of them impact the destination in economic, environmental and social terms (Getz & Page, 2016b). The concept of social impact is notoriously intangible and complex and, therefore, requires considerable attention in order for practitioners and policymakers to be able to operationalize it in evaluations of entire event portfolios.

This paper does not offer a description of the full plethora of social impacts arising from planned events. Rather, our purpose is to create a point of departure to encourage continuous comparability between planned events. Additionally, it is important to do so in a manner that is accessible to destination practitioners and other non-academic stakeholders.

Method

A case for a Delphi approach

Since we aim to move towards a standard measurement of the social impact evaluation of events, we chose to adopt lessons from previous attempts at finding consensus in social science research and real world examples of standardization processes. The single most important facet to the creation of any standard is the act of achieving consensus. This is because, in order to be effective, standards rely on widespread recognition and acceptance within the fields in which they are applied (Ace, 2018; Hsu & Sandford, 2007; Lin & Song, 2012, 2014).

In academia, the Delphi technique is widely used for achieving consensus within any given domain of expertise (Hsu & Sandford, 2007; Lin & Song, 2014). The technique's qualities allow it to be applied as a first step to dealing with seemingly complex problems in various contexts (Green, Hunter, & Moore, 1990). Delbecq, Van de Ven, and Gustafson (1986) summarize five principal applications of the Delphi technique, one of which is the establishment of a consensus on a given topic, amongst a group of experts, either within or across disciplines.

The Delphi approach is iterative, meaning that a panel of experts is engaged in a process consisting of several steps. Each step refines the subject matter until a result is reached that represents the lowest common denominator of the experts' opinions relating to a particular subject matter. Theoretically, there is no limit on the amount of iterations that can be conducted. Nevertheless, several authors agree that three rounds of surveys usually is adequate to reach consensus on a given subject (Custer, Scarcella, & Stewart, 1999; Delbecq et al., 1986; Green et al., 1990; Miller, 2001; Sherwood, 2007). Hsu and Sandford (2007, p. 2) describe up to four steps in order to demonstrate the adaptability of the technique to situations where 'iterations beyond three are needed or valuable'.

In their review of Delphi application in tourism, Lin and Song (2014) concluded that, whilst controversial at times, the Delphi technique constitutes one of the most efficient ways of determining consensus on broad themes but also forecasting trends in tourism. Criticisms tend to focus on the technique's qualitative nature (Wheeller, Hart, & Whysall, 1990), whilst proponents argue that applying descriptive statistics to the analysis of the data render these criticisms somewhat unfair (Lin & Song, 2014). The other main area of contention is the lack of clear directives for how one should construct Delphi panels. This raises questions about the validity of some of the panels and, consequently, the results of certain studies in which this technique has been applied (Donohoe & Needham, 2009).

Lin and Song (2012) present *scenario writing* as the principle alternative to the Delphi approach in qualitative forecasting applied to tourism. As the name suggests, this process involves the production of different scenarios based on a set of pre-decided parameters (Veal, 2002). For example, rate of inflation (high, low) and rate of climate change (high, low) might be two variables upon which a scenario writing exercise could be based. These two dimensions, in turn, offer four possible scenarios on which tourism demand could be forecasted. Additional variables can be introduced to enrich the forecast. Though we originally considered scenario writing for our own study, we deemed this procedure unsuitable since our aim was not to involve projections of various scenarios but rather to try to establish a common ground on indicators that holds value in a range of possible scenarios.

Applications of Delphi to compiling social impact typologies or exploring social impact futures in tourism are limited. However, the technique has been used to deal with social impacts in contexts such as social value assessments of ecosystem services (Cole, Holland, & Donohoe, 2015), or in the construction of indicators for sustainable tourism in which social indicators were included (Miller, 2001). Perhaps the best case for a Delphi method approach in the context of this paper can be found in Sherwood's (2007) earlier mentioned doctoral thesis that set out to develop standardized measures for TBL impact assessments of events. His thesis employed a web-based Delphi survey to condense the selection of indicators for economic, social and environmental impacts into a sharper tool consisting of the most agreed upon indicators within each realm. He applied these indicators to two case studies and subsequently evaluated the results.

The importance of choosing an appropriate panel is crucial to the success of a Delphi survey (Chan, Yung, Lam, Tam, & Cheung, 2001; Delbecq et al., 1986; Hsu & Sandford, 2007). The approach taken in the selection of panel members differs between studies. Whilst some employ mixed panels of academics and industry representatives (Sherwood, 2007), others focus solely on scholars with a solid record of publication (Miller, 2001). Our investigation focuses on the scholar perspective for two reasons. Firstly, as Sadd et al. (2017, p. 2) point out, academics are more likely neutral towards any given topic of inquiry compared to their practitioner counterparts. They also make for particularly suitable informants in policy-related research in the contemporary knowledge-oriented economy.

Secondly, scholars should have a higher familiarity with the terminology and key concepts from the event management and evaluation theory on which the survey is based. The iterative process requires feedback to the respondents between steps. The capacity of respondents to interpret the questions and return consistent feedback relies on a common understanding of the information being exchanged. The more respondent groups involved in a Delphi survey, and the more heterogeneous they are, the larger the sample from each respondent group needs to be to balance each other in the consensus process (Hsu & Sandford, 2007).

Implementing the Delphi approach

For this study, we created a set of criteria to guide the selection of the expert panel. The selection criteria required that each panel member had to be a published researcher within one or more of the following themes: (a) sustainable development in the context of tourism or planned events; (b) social impacts of tourism or planned events; (c)

tourism and/or destination planning; (d) event studies. Accordingly, the following key words were typed into Primo and Google Scholar to help us identify potential respondents: *tourism impacts*, *event impacts*, *event policy*, *tourism policy, social impact*. This led us to select authors who clearly informed the research problem through their respective body of work. For example, an article on tourism impacts, had to also include at least one other of the relevant subject matters such as policy. In effect, if we discovered an article that discussed the implications of the social impacts of tourism on policymaking then this author would be included in the gross list of potential respondents.

Eventually, this process led us to identify 79 potential panel members. After contacting these individuals, a total of 17 experts agreed to participate in the first round of the Delphi survey whilst in the subsequent round 12 respondents from the same group chose to participate. Whilst occasional Delphi studies use panel groups in the hundreds, most land on panel sizes of 50 or fewer. Highlighting the dilemma of determining suitable sample sizes, Lin and Song (2014, p. 1117) suggest that despite the fact that large groups bring with them a higher intellectual capacity and a wider range of experiences in relation to any given problem, larger groups also increase the likelihood of friction, unproductive arguments and the generation of irrelevant or superfluous information.

For our purposes, we deemed a smaller group size to be suitable. Taylor and Judd (1994) proposed 10–15 panel members as an appropriate sample in studies where the experts were from a homogenous group. Similarly, Rowe and Wright (2001) suggest five to 20 experts as a baseline, so long as they bring different perspectives to the specific problem being scrutinized. Holey, Feeley, Dixon, and Whittaker (2007) find consensus in a study containing only 12 participants, highlighting the importance of stability in the context of their research.

It is normal when conducting Delphi studies relating to tourism to disseminate between two and four rounds of assessment surveys to the expert panel. Nevertheless, Lin and Song (2014) show that conducting two rounds is most common, at least in a tourism context. We chose to employ two rounds, bearing in mind that a third might have been necessary in the case of ambiguous results following the initial two rounds. In final analysis, however, the third round proved unnecessary since, by that stage, we had gained a clear idea of where respondent attitudes and agreement lay with regards to the indicators.

In the first round, we asked the panel members to put forward five indicators for the social impact of events. The indicators had to, in the respondents' view, fulfill criteria pertaining to *comparability between events*, *applicability to different destination contexts* as well as *utility for event portfolio – and destination management*. For each indicator, the expert had to outline a short description in the form of the source and type of data that should be employed to address the indicator in question. We selected this exercise as an alternative to a literature review where the author provides the indicators. By allowing the panel to generate indicators, the first round also served the purpose of an initial indicator-importance assessment. We analyzed the information collected in the first round to consolidate proposed indicators that strongly overlapped between respondents. Additionally, we conducted a screening to filter out proposed indicators that failed to correspond with the outlined criteria. We disregarded answers if they could not be considered as clearly discernable indicators. For example, we removed 'Qualitative Analysis', which functions as an umbrella term for a number of methodologies. Care was taken in this consolidation process as to not misconstrue any of the indicator information presented by the

panel members in the first round. Where possible, we left untouched the original wording of the respondents. The second round presented the panel members with the indicators generated from the initial stage. Subsequently, we added an indicator description based on respondent input to communicate each indicator more clearly. We asked the panel members to assess the indicators, along with the data source and data type suggested for each, according to the study criteria. The assessment consisted of five-point Likert scales and optional comments (Table 2).

Having assessed the 33 proposed indicators, we finally asked the respondents to rank the five most important indicators from the same list. We weighed the rankings so that the indicator ranked first received 5 points while the one ranked fifth received 1 point.

Consensus can broadly be described as an agreement on a particular topic (Holey et al., 2007). In turn, agreement can be measured in terms of the level of agreement and the stability of responses (Dajani, Sincoff, & Talley, 1979). In our study, we focused on agreement rather than internal stability as previous literature is employed to consolidate respondent answers, lessening the need for stability in the primary data. Dajani et al. (1979) further deconstruct agreement to include disagreement, plurality, bipolarity, majority and consensus. Disagreement is when each respondent exhibits opinions that are independent of those of other respondents. Plurality describes when members of a group that is smaller than 50% of the sample exhibit agreement. Bipolarity describes a situation where agreement is split 50/50 over a question. Majority describes a situation where more than 50% of the expert panel exhibit agreement. Finally, consensus is the term used to describe unanimous agreement on an issue.

As consensus (in the above sense) is unlikely to occur over two rounds of surveys, we aimed to achieve majority agreement in this study. We removed indicators that did not show a majority agreement from the final results. Similarly, we terminated indicators that failed to generate a score in the importance ranking. The resulting indicators were then triangulated with those of Deery and Jago (2010) as well as Sherwood's (2007) indicators for social impact to see if the data is corroborated with the relevant research.

Results

To gauge the level of consensus among respondents, we divided the answers relating to each indicator for second round statements into *agreement*, *neutrality* and *disagreement*. We ranked and presented these according to those indicators where agreement was found (Table 3). In Table 4 we then show the importance ranking and the mean statement scores for the indicators that had exhibited majority agreement. In the same table, the indicators are then compared to those offered by Deery and Jago (2010) as well as Sherwood (2007) to see which of them were validated by established literature in the same field.

Based on the above process, the conclusive list of indicators were ones that: exhibited majority agreement; were discernable in the importance ranking; and were supported by the literature (Table 5). In turn, these indicators are:

- *Community quality of life*, which is the overwhelmingly highest rated indicator in terms of perceived importance. Respondents rated this the highest with a score of 41 (Table 5). The statement aggregate mean score for this indicator was 3.60. Deery and Jago (2010) as well as Sherwood (2007) supported the use of this indicator as a

Table 3. Indicators that achieved majority agreement ranked from highest to lowest.

Indicator	S. Agree/Agree	Neither agree nor disagree	S. Disagree/Disagree
Visitor satisfaction	79.2%	2.1%	18.8%
Facilities impact	70.8%	14.6%	14.6%
Community lifestyle disruption	68.8%	12.5	18.8%
Community quality of life	64.6%	20.8%	14.6%
Public cost/benefit	64.6%	10.4%	25.0%
Overnights/community inhabitant ratio	64.6%	6.3%	29.2%
Community well-being	60.4%	14.6%	25.0%
Community pride	60.4%	14.6%	25.0%
Community engagement	56.3%	20.8%	22.9%
Visitor density	56.3%	31.3%	12.5%
Community capacity enhancement	56.3%	18.8%	25.0%
Attendance support	56.3%	29.2%	14.6%
Sense of community	54.2%	29.2%	16.7%
Social capital	52.1%	29.2%	18.8%

measure of social impact. This indicator was described to respondents as the general impact on the perceived conditions under which community residents live.

- *Community pride* (also 'civic pride'), received an aggregate mean score of 3.46, and ranked sixth in the importance ranking. Both the reference studies also supported this indicator's use for measuring social impact. Community pride refers to the impact on community residents' sense of pride from living in a locality where a certain event takes place.
- *Social capital* was also ranked sixth in the importance ranking. However, it received a slightly lower aggregate mean score (3.44). In this case, only Deery and Jago (2010) backed-up the use of this indicator. Social capital, as outlined by the study participants, describes the impact an event has on community residents' social networks and networking opportunities (e.g. does the event offer opportunities to meet and interact with event visitors or other community residents?)
- *Sense of community* had an aggregate mean score of 3.40, ranking ninth in importance. In this case, only Sherwood (2007) included *Sense of community* in his list of social

Table 4. Agreed indicators importance ranking and mean statement scores.

Indicator	Perceived importance	Aggregate mean score from statements	Supported by Deery and Jago (2010)	Supported by Sherwood (2007)
Community quality of life	41	3.60	X	X
Community engagement	12	3.52	–	–
Community well-being	11	3.38	–	–
Visitor satisfaction	11	3.90	–	–
Public cost/benefit	9	3.46	–	–
Overnights/community inhabitant ratio	7	3.46	–	–
Community pride	6	3.46	X	X
Social capital	6	3.44	X	–
Community lifestyle disruption	5	3.67	–	–
Visitor density	3	3.44	–	–
Sense of community	1	3.40	–	X
Community capacity enhancement	1	3.42	X	–
Facilities impact	1	3.71	X	–
Attendance support	0	3.60	–	–

Table 5. Final indicator set.

Final indicators
Community quality of life
Community pride
Social capital
Sense of community
Community capacity enhancement
Facilities impact

impact indicators. Sense of community is intended to capture the impact an event has on community residents' perceived sense of cohesion following an event. This indicator focuses on the experiential aspects of the community as opposed to physical and geographical definitions.

- *Community capacity enhancement* exhibited a 3.42 aggregate mean score and was also ninth in importance. Only Deery and Jago (2010) listed this. Community capacity enhancement is meant to capture the ways in which an event provides opportunities for community members to somehow build competency. This can, for example, come in the form of employing community members as staff at the event, giving local youth the opportunity to volunteer and gain work experience or simply by the contents of the event being of a nature that somehow builds competency such as a scientific conference held at a university.
- Finally, *Facilities impact* received a 3.71 in aggregate mean score. Again, it shared the ninth place importance ranking alongside *Sense of community* and *Capacity enhancement* and, once more, only Deery and Jago (2010) backed this as a measure. Facilities impact was described to the respondents as the perceived improvement of infrastructure and facilities because of a planned event, as well as the perceived access to these facilities for community members.

It is important to briefly mention why certain indicators failed to make the final selection. For instance, even though respondents agreed on the validity of *Visitor satisfaction*, ranking it third and giving in an aggregate mean score of 3.90, neither Deery and Jago (2010) nor Sherwood (2007) listed it as a metric for the social impact of events. Thus, we chose to exclude this indicator. An explanation for omitting this indicator is that because visitor satisfaction surveys are widely used both in and out of academia this metric scored highly on accessibility and communicability as well as applicability for both varying types of events and destinations. In other words, it was perceived to be accessible and easily digestible for non-academics. However, the reference literature did not consider it a social impact per say, likely because it does not focus on the host community.

What the final list of indicators provides us with is a framework on which destination policymakers can improve their understanding about social impacts. The Delphi process we chose to use and its outcomes echoes the one that Miller (2001, p. 361) undertook in his search of indicators for Sustainable Tourism, in which he concludes:

> *Although it seems paradoxical to develop indicators for ST when no satisfactory definition of the concept exists, the process of developing the indicators does help in determining the important tenets of the concept.*

Similarly, the process of searching for usable social impact indicators helps us to refine the concept of social impact overall as well as what this means in an event policy setting. The interpretation of our results can thereby be done from two perspectives: either from the utility of the indicators themselves; or from the bigger question of understanding the social impacts of events.

Discussion and conclusion

In accordance with the learning destination perspective, we have sought to offer a set of indicators that could potentially facilitate access to information for destination decision makers. In other words, the indicators offer a set of values to evaluate and compare events in a portfolio. It is with these types of comparisons that destinations can build more strategically-sound event portfolios; portfolios that take into account possible synergies between events, between events and the destination, and that allow for adaptation to local contexts.

That being said, since the learning destination as outlined by Sadd et al. (2017) presupposes an adaptive approach where measures are created on the go and through dialogue with local stakeholders, we argue that a common language is needed before this communal learning takes place. In the context of this study, when social impacts are discussed, all involved should share an understanding of what is meant by social impacts. This paper moves towards filling this gap, providing a limited set of indicators that can be discussed and operationalized in any portfolio management context.

A well-constructed implementation should identify the operative units of measurement for each respective indicator and the best way to assess these. Then, the indicators should be integrated into the discussion with key destination stakeholders to arrive at suitable evaluation objectives. For instance, the following provides a case for how the implementation of the studies indicators could conceivably look: Policymakers leading the discussion should first introduce the indicators by which social impact of events can be measured and what each type of indicator means. Based on this common understanding, the discussion can then move on to handle questions as to which social impacts are more desirable in the local context and what local stakeholders value more. For example, the key destination stakeholders of destination X are brought in to a planning workshop, where the six indicators are outlined and explained to all participants. Based on this explanation, participants then jointly decide that *capacity enhancement* and *social capital* should be valued in the context of destination X and then the appropriate indicators are picked and subsequently used across all events in the destinations' event portfolio.

Although the panelists of our Delphi process offered descriptions of data types and sources in the first round, one of the main challenges of this study was the varying level of abstraction of the indicators proposed by the respondents. Whilst some may serve as stand-alone indicators, others likely are umbrella concepts for a number of sub-indicators. *Social capital*, for example, may entail more than one unit – or even method – of measurement. Whereas some studies employ network analysis to analyze the build-up of social capital in a community connected to an event, others may employ community resident surveys to gauge social capital accumulation on the level of the individual.

While the interpretation of the study criteria and differing levels of abstraction is one potential limitation, questions marks also remain with regards to the sample and whether

the inclusion of practitioners rather than or in addition to the academics would have yielded a different set of indicators. Although both academic, practitioner and mixed panels have been shown to work in previous research (Lin & Song, 2014), the nature of this study's purpose led us to believe that a pure researcher panel was most appropriate. Separating academics from practitioners also reduced the risk of confusion or conflict in the interpretation of the indicators amongst panel participants. A follow up study on the implementation of the indicators is planned where the practitioner perspective will be integrated and considered. The practitioner centered study will serve to complement and validate the usefulness of the indicators.

Nevertheless, further research is needed on the dynamics of event management on the level of the destination and the community. Benchmarks should be studied to gain a superior understanding of how successful event destinations evaluate, plan for and execute strategic event portfolios. In addition, economic and environmental indicators should be subjected to a similar process, whereby those indicators that are fit to be used by destination management are elicited from the broad range otherwise available.

The idea of unified indicators in the context of this paper does not aspire to replace efforts to continually evaluate and improve individual events. Rather, it solely addresses the need for a clear, common language when actors on the policy level attempt to distinguish between events and make decisions regarding bidding and funding based on these distinctions.

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No potential conflict of interest was reported by the authors.

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