EXPLORING INTANGIBLE AND NON-FINANCIAL SUCCESS METRICS FOR PROFESSIONALS IN THE MEETINGS AND EVENTS INDUSTRY

A Dissertation in

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By

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ABSTRACT

The study discussed in this paper comes at a critical time. As the meetings and events industry continues to grow and mature, and meetings and events become strategic solutions for clients, professionals are required to show business value in the meetings and events that they plan. Clients need constant reassurance that their event will have a positive and successful outcome. In some cases, this measure of success can be a financial one: where the meeting or event benefits outweigh the costs. However, with a wide variety of meeting and event types, it is not always possible to quantify benefits with a dollar value. Meetings and events can have intangible benefits, but with current industry evaluation models, these intangible benefits are not measured well and are somewhat ignored. Another gap in current meeting and event evaluation models is the focus. Models, such as the Phillips’ Return on Investment (ROI) Methodology, measure return on investment for the client, but much of the data is not relevant or collectible for the meeting professional. Little information exists on how planners can measure the success of their meetings and events. The need to demonstrate business value and limited success metrics are the key reasons why this study was conducted.

From an evaluation standpoint, industry professionals are faced with two primary issues. The first issue is the definition of a successful meeting or event, and the second is how to appropriately measure intangible, non-financial success. What constitutes success may vary by industry segments or meeting type, but these nuances aren’t addressed in current evaluation models, such as ROI. ROI is only an appropriate measure in five percent of meetings and events (Myhill & Phillips, 2006), which suggests that additional success metrics can be developed and tested.

A two-tiered study employing qualitative and quantitative methodologies was used to address the multiple study purposes. First, telephone interviews were conducted with the
objective of identifying how meeting and event industry professionals define and discuss success in the events they plan, as well as uncover key success traits along with ways to measure them. In addition, the results of the interviews were reviewed to determine if the Pine and Gilmore Experience Economy framework is an appropriate classification for meetings and events industry evaluation models. The emergent themes from the first part of the study were used to inform a questionnaire sent to a sample of the meetings and events industry population for triangulation. The sample of professionals shared their levels of agreement with the definition of meeting and event success, and key traits and measurement metrics of success. The results of the survey were analyzed using a chi-square statistical analysis and used to suggest a new model for success evaluation.
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Chapter 1

Introduction

Overview

Meetings and events are big business, representing a $263 billion industry (Convention Industry Council, 2011a). In 2009, more than $106 billion was contributed to the United States gross domestic product for 1,266,200 corporate meetings, attended by more than 107 million people (Convention Industry Council, 2011b). According to the Bureau of Labor Statistics (2010), the employment of meeting and convention planners is expected to grow faster than the average for all occupations in the United States. Even through the recent economic downturn, Meetings & Conventions (2010) discovered in their 2010 Salary Survey that salaries of meeting and event professionals are up since 2007.

Even with a positive economic contribution, the industry has recently come under fire, as perceptions of meetings and events equate to extra and unnecessary expenses. For example, on November 9, 2011, President Obama signed an Executive Order to cut wasteful spending, which targeted a 20% reduction in government travel and conference spending (O’Keefe, 2011; Office of the Press Secretary, 2011). In 2013, members of the House of Representatives proposed the Stay in Place, Cut the Waste Act, H.R. 2643, to decrease government events and travel dollars by 50% from 2013 levels (Kasperowicz, 2013).

In 2009, the Professional Convention Management Association (PCMA) started a grassroots effort called “Keep America Meeting” (TBA Global, 2011), to change the perception of the industry and renew the importance of face-to-face meetings. The mission of the PCMA is to serve the association community by enhancing the effectiveness of meetings, conventions, and
exhibitions through member and industry education and to promote the value of the meetings industry to the general public (PCMA, 2013). PCMA and other industry associations, such as Hotel Sales and Marketing Association International, the Society of Incentive Travel Executives, and the Convention Industry Council (CIC) also support the strategic nature of the meetings and events industry (TBA Global, 2011). However, even with the efforts and support of meeting and event associations, the industry continues to draw criticism. In February 2010, U.S. President Barack Obama received backlash for his harsh comments about trips to Las Vegas, Nevada. During a town hall meeting in New Hampshire, Obama was quoted as saying:

> When times are tough, you tighten your belts. You don’t go buying a boat when you can barely pay your mortgage. You don’t blow a bunch of cash on Vegas, when you’re trying to save for college (Navidi, 2010).

The President later mentioned that he was not criticizing the city of Las Vegas, but merely commenting on wasteful spending (Navidi, 2010). But some public relations damage to the location had been done.

The study discussed in this paper comes at a critical time. As the industry continues to grow and mature, and meetings and events become strategic solutions for clients, professionals are required to show business value in the meetings and events that they plan. Clients need constant reassurance that their event will have a positive and successful outcome. In some cases, this measure of success can be a financial one: where the meeting or event benefits outweigh the costs. However, with a wide variety of meeting and event types, it is not always possible to quantify benefits with a dollar value. Meetings and events can have intangible benefits, but with current evaluation models, these intangible benefits are not measured well and are somewhat ignored. Another gap in current meeting and event evaluation models is the focus. Evaluation techniques such as the Phillips’ Return on Investment Methodology measure return on investment for the client, but according to a study done by IDG Research Services and Kapow Software (Bertolucci, 2013), much of the data is not relevant or collectible for the meeting professional.
The need to demonstrate business value and limited success metrics are the key reasons why this study was conducted.

A Historical Perspective of Meetings and Events

The meetings and events industry has been around for a long time, but opinions vary on the first recorded meeting. According to Hensel (2010), the first recorded meeting took place in 1274 when Marco Polo traveled to meet Kublai Kahn. It is difficult to document every meeting that has ever taken place, but the organization Meeting Professionals International brings to our attention the important outcomes of meetings. For example, in 1604, The Hampton Court Conference was held to settle differences between the Puritans and the Church of England’s bishops (Curtis, 2008). James VI of Scotland called for a three-day conference, which led to the Authorized King James version of the Bible (Hensel, 2010).

During the 1800s, revolutionary meetings included the initiation of the organized women’s right movement in the United States, which began at the Seneca Falls Convention in 1848 (Gurko, 1974), and when the International Olympic Committee met in 1894 to revive the ancient Olympic games in Athens for 1896 (Miller, 2003). In the 1900s, meetings continued to shape the world. The Black Hand Secret Society formed in Serbia in 1911 to create a “Greater Serbia” (Roudometof, 2000), even if it involved violence, and contributed to the start of World War I (Hensel, 2010). In 1927, the Fifth Solvay International Conference was held. The attendees, including Albert Einstein, Niels Bohr, and Erwin Schrodinger, debated quantum mechanics (Nicolis, 1980). Then, in 1944, the goal of the Dumbarton Oaks Conference, attended by the United States, the Soviet Union, the United Kingdom, and the Republic of China, was to create an international organization that would keep peace after World War II (Borchard, 1945). The result was the creation of the United Nations (Hensel, 2010).
In the 1950s, Ray Kroc met Dick and Mac McDonald. Kroc’s insights and gumption turned a small-scale franchise into one of the world’s most recognizable brands (Hensel, 2010). In 1957, John Lennon met Paul McCartney and paved the way for the Beatles, which influenced songwriting and recording techniques around the world (Schneider, 1999). And, in 1960, at the Baghdad Conference, government representatives from Iran, Kuwait, Saudi Arabia, and Venezuela met to discuss crude oil production, and to work on better communication among the invited countries (Azzam, 1963). This led to the formation of the Organization of the Petroleum Exporting Countries (Hensel, 2010). Small or large, meetings and events have helped shape world history.

Today, meetings are big business, representing a $263 billion industry (Convention Industry Council, 2011a). In 2009, more than $151 billion was spent on 1.8 million U.S. meetings that were attended by more than 204 million people (Convention Industry Council, 2011b). According to the Bureau of Labor Statistics (2010), the employment of meeting and convention planners is expected to grow faster than the average for all occupations in the United States.

With an industry as large as meetings and events, it is important to have techniques to evaluate their outcomes. Return on Investment (ROI), defined as the value generated by the meeting in relation to its cost (ROI Institute, 2005), is the new rallying cry of meeting professionals. Although no hard-and-fast benchmarks yet exist, the MPI Foundation, under the sponsorship of the Marriott Corporation, has developed a self-study program titled, “Maximizing Your ROI.” The program’s purpose is to “demonstrate the value of meetings to top management and help planners learn measurement methods to quantify and qualify the success of their meetings” (Selling Communications, 2011).
Segments Within the Meetings and Events Industry

The meetings and events industry can be segmented by type, such as corporate meetings, corporate events, association meetings, governmental meetings, trade shows, and training (Betzig, 2006; Selling Communications, 2011) or by the acronym MICE, defined as Meetings, Incentives, Conferences, and Exhibitions. The acronym is applied inconsistently with the “E” sometimes referring to events (ICCA, 2013) and the “C” sometimes referring to conventions. MICE refers to a particular type of tourism in which large groups, usually planned well in advance, are brought together for some particular purpose. Recently, there has been an industry trend towards using the term "meetings industry" to avoid the confusion associated with the acronym (ICCA, 2013). This paper uses the term “meetings and events industry” to define the population of interest for this study.

Corporate meetings and events. Corporate meetings involve an exchange of information between a company’s key people (Convention Industry Council, 2011a; Selling Communications, 2011). Markers of corporate meetings and events are convenience, value, and image (Selling Communications, 2011) and typically do not earn income as a result of the meeting (Betzig, 2006). Companies are under increasing pressure to limit expenditures in all business areas including meetings, so a loss or subsidy budgeted for events must be kept within reasonable limits (Betzig, 2006).

Association meetings. Most associations are non-profit organizations. This means that profits cannot be excessive and must be used to operate or grow the association (Betzig, 2006). Some non-profits are charitable organizations that must distribute all excess income over expenses. All United States associations are tax exempt from U.S. Federal income tax and may be exempt from sales tax in some states (Betzig, 2006). Association meetings are commonly
known as annual meetings that bring the membership together for education, networking, and fundraising (Betzig, 2006).

**Governmental meetings.** The overall philosophy for governmental meetings is to break even financially. Registration fees must be kept within reasonable ranges, expenses must be tightly controlled, and attendees must stay within per diem guidelines (Betzig, 2006).

**Trade shows.** Associations and corporations hold trade shows or exhibitions in order to generate sales for products and services of the membership. Locations can be determined by appeal, as well as market characteristics, image, industry location, facilities capacity, and transportation access (Convention Industry Council, 2011b; Selling Communications, 2011).

**Training.** Held by corporations, associations, and governmental agencies, training meetings highlight education (Selling Communications, 2011).

In 2009, the meetings and events industry generated more than 16 % ($113 billion) of the U.S. travel and tourism industry’s estimated $708 billion direct tourism output (Convention Industry Council, 2011b). Direct tourism output is akin to revenue or sales in a corporation. The industry is also directly accountable for 7% of the air transportation industry’s operating income and directly supports 1.65 million full- and part-time jobs in the United States (Convention Industry Council, 2011b). According to the CIC, a total of 6.3 million individuals are directly or indirectly employed in some aspect of the industry (2011). With impact like this, it is important to have appropriate metrics for success, both financial and non-financial.

**Statement of the Problem**

As a result of 2010’s economic downturn, the meetings and events industry and meeting professionals came under scrutiny. The meeting professional is employed to oversee and arrange every aspect of an event, from planning, organizing, implementing, and controlling resources
Budgets for off-premise meetings, business travel, and incentives were drastically reduced for governments, corporations, and associations (Johnson, 2013). Meeting professionals needed to provide definitive proof that the events they planned added value for their client, with clients insisting on high investment returns in order to hold the meeting (Hamso, 2013).

In response to the poor economy and declining budgets, the CIC issued a report called the Economic Significance of Meetings to the US Economy, or the Economic Significance Study. This comprehensive study shared data that quantified the meetings and events industry, in terms of contribution of face-to-face meetings to the U.S. economy (Convention Industry Council, 2011b). While this report revealed economic contribution data in terms of output, gross domestic product contribution, employment, labor income, and taxes (Convention Industry Council, 2011b), it did not delve into individual success metrics for meeting professionals to measure their value as a planner.

From an evaluation standpoint, industry professionals are faced with two primary issues. First is the definition of a successful meeting or event and the second is how to appropriately measure intangible, sometimes non-financial success. What constitutes success may vary by industry segments or meeting type, but these nuances aren’t addressed in current evaluation models, such as ROI. ROI strives to measure how effectively a meeting uses its capital to generate profit; the higher the ROI, the better (Pulliam-Phillips & Phillips, 2005). Pulliam-Phillips and Phillips (2005) calculate the ROI percentage by dividing the net benefit (return) of the meeting or event by the cost of the investment.

ROI is only an appropriate measure in five percent of meetings and events (Myhill & Phillips, 2006), which suggests that additional success metrics can be developed and tested, and perhaps debunk the “one size fits all” nature of the ROI model. Based on this premise, this study proposed to define success for the meeting professional and identify key components that drive
successful meetings and events. This study’s primary purpose is to have meeting professionals discuss and define success in the events that they plan, based on their documented experiences, and identify key (and potentially non-financial) planning factors that help create success.

Secondarily, this study looks to identify a connection between event type and evaluation metrics to determine if appropriate success metrics vary per meeting/ event type. Based on my personal experience in the meetings and events industry and my interaction with meeting professionals, I had learned that regardless of industry segment (i.e. corporate, association, government, etc.), professionals plan similar types of events. Based on my industry interactions, commonality among meetings and events often include education, entertainment, and networking components.

My industry observations led me to base this study on the conceptual framework of Pine and Gilmore’s Experience Economy as a lens to view the meetings and events industry. Pine and Gilmore (1998, 1999, 2001, 2011) suggest that the economy has progressed from an agrarian, or commodities based one, to an industrial (goods) economy, then to a service economy, and finally to an experience economy, where “experiences are as distinct from services, as services are from goods” (1999, p.2). Pine and Gilmore (1998, 2011) further suggest that experiences can be sorted into four categories of entertainment, education, escapist, and esthetic. Pine and Gilmore (1998) state “an experience occurs when a company intentionally uses services as the stage and goods as props, to engage individual customers in a way that creates a memorable event” (p. 98).

Because this study seeks to determine if meeting/ event success varies per event type, the Experience Economy framework offers a model that can be applied to the industry. The study’s secondary purpose is to document experiences offered by industry professionals to determine if success is, as alleged by Pine and Gilmore (1998, 1999, 2001, 2001), multidimensional and focused on entertainment, education, escapism, and esthetics.
Research Questions

In order to address the multiple purposes of this study, the following research questions were formulated:

1. How do meeting and event professionals define success of their planned meetings and events?
2. Do key factors in the planning process exist that contribute to meeting/event success?
   a. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events?
   b. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events?
   c. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events?
   d. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events?
3. If key factors are identified, how are they tracked and measured by meeting professionals?

Significance of the Study

The study discussed in this paper is significant due to the major contribution of the meetings and events industry to the United States economy. The Economic Significance Study (Convention Industry Council, 2011b) found that in 2009, almost 1.8 million meetings, with 205 million participants, took place in the United States. These meetings equated to over $263 billion in direct spending with $113 billion was spent on travel and tourism such as lodging, food and
beverage, and transportation, and another $115 billion involving meeting planning and production. The Economic Significance Study documented significant contribution from meetings activity in terms of output, contribution to gross domestic product, employment, and labor income.

With $263 billion in direct spending attributed to meetings and events, the industry continues to grow and become more strategic in nature. A clear definition of a successful meeting professional is needed. In addition, a comprehensive evaluation methodology is also important. Even though the ROI methodology is presented as the evaluation method of choice for the industry, it is only used in less than one percent of meetings and events, and may only be appropriate in five percent of meetings (Myhill & Phillips, 2006; Phillips, Breining, & Pulliam-Phillips, 2008). The outcomes of the study in this paper offer benefits to the meetings and events industry as a whole, companies that employ meeting professionals, as well as the professionals themselves.

**Conceptual Framework**

This research study is informed by extant theory. The current evaluation model used to measure meeting and event success is the Phillips’ ROI Methodology. Developed by Jack Phillips, this methodology is based on five levels of evaluation data, which ultimately determine the ROI: (a) inputs/indicators, (b) reaction and perceived value, (c) learning, (d) application and implementation, and (e) impact and consequences (Phillips, Myhill, & McDonough, 2007).

This model does not match the needs of all meeting professionals for a number of reasons. First, this model is more appropriate for the clients of the planned meeting and events, rather than the planners themselves. The ROI model has four stages. First, is planning, during which the inputs/indicators data are captured. The second step is data collection, in which the
remaining evaluation data are collected at or after the meeting (Phillips, et al., 2007). The third step is data analysis, where ROI is calculated, and then reported in the fourth step. Much of the data in the ROI process are not collectible by the meeting professionals, as their role in the meeting/event takes place in the planning (first) stage. The remaining levels of evaluation data are collected during and after the event by the attendees or clients of the meeting. Meeting professionals generally would not have access to this information.

Second, this methodology does not account for intangible and non-financial metrics very well. By interacting with meeting professionals for over 20 years, I have come to understand some of their issues with the current evaluation models used in the industry. Because not all meetings/events have financial motivation, this study explores the value that could be added to success measurement by identifying non-financial factors in the planning process and including these factors in evaluation.

Professionals, regardless of industry segment, plan meetings/events with similar components. Meetings may have an educational or entertainment focus, or may involve a combination. Because many meetings have educational and entertainment components, studying the meetings and events industry through the four experience realms, as proposed by Pine and Gilmore, may offer a clearer definition of success and appropriate evaluation techniques.

Pine and Gilmore (1998, 2011) suggest that products mean more to clients than just its physical nature, because enjoyment comes from the “experience” that coincides with the consumption of a tangible good or intangible service. Pine and Gilmore (1998, 2011) further suggest that experiences can be sorted into four categories or “realms”: entertainment, education, escapist, and esthetic.
Educational experiences, as discussed by Pine and Gilmore (1999), allow the attendee to absorb the events as they unfold, but these experiences require the active participation of the attendee. Pine and Gilmore state, “to truly inform a person and increase his knowledge and/or skills, educational events must actively engage the mind (for intellectual education) and/or the body (for physical training)” (p. 32).

Entertainment experiences are passively absorbed through the senses (Pine & Gilmore, 1999) such as viewing a performance, listening to music, or reading. Pine and Gilmore (1999) describe the escapist realm as one where the attendee would actively participate in an immerse environment. The fourth realm of Pine and Gilmore’s model is the esthetic, defined as
experiences where “individuals immerse themselves in an event or environment, by they themselves have little or no effect on it” (p. 35).

This study seeks to determine if meetings and events can also be sorted into all four experience realms and to explore the possibility that planned events within each realm may share tangible, intangible or non-financial success indicators.
Chapter 2

Review of Related Research

Overview

The initial account of grounded theory suggested that the literature review be conducted after the research (Glaser and Strauss, 1967), and this is one of the key departures of grounded theory from traditional and positivist research models. However, it is no longer considered essential to delay the literature review (Charmaz, 2006), and I found a preliminary literature review essential at a functional level to identify gaps in previous research.

The primary purpose of this study is to have meeting professionals discuss and define success in the events that they plan, based on their documented experiences, along with the identification of key (and potentially non-financial) factors that help create success. The secondary purpose is to determine if the meetings and events industry can be classified according to the Experience Economy framework and these experiences offered by the meetings and events industry are, as alleged by Pine and Gilmore (1998, 1999, 2001, 2011), multidimensional and focused on entertainment, education, escapism, and esthetics.

This chapter discusses the existing scholarly and industry literature, as well as existing research in the areas of evaluation techniques and the experience economy, in order to identify any gaps that this study should fill. This chapter is separated into three parts: first, a brief background of the meetings and events industry; second, a discussion of evaluation and the current meeting and event industry techniques; and third, a discussion of Pine and Gilmore’s model of the “Experience Economy.”
Background

The Convention Industry Council (CIC) was formed in 1949 as the Convention Liaison Council. The purpose for forming the Council was to aid and facilitate the exchange of information about the meetings and events industry (About the Convention Industry Council, 2013). By 2013, the CIC had grown to 31 member organizations with more than 103,500 individuals and 19,500 firms and properties involved in the meetings, conventions, and exhibitions industry (About the Convention Industry Council, 2013). The CIC strives to establish best practices for its member organizations across the meeting and events industry. Although the Phillips’ Return on Investment (ROI) model is currently used as the preferred metric of meeting and event success, the CIC has not released research regarding its application to all meetings and events. Jack Phillips, creator of the Phillips’ ROI Methodology, stated, “not all meetings are candidates for ROI measurement” (Myhill & Phillips, 2006, p. 18). ROI may only apply in five percent of meetings and events (Myhill & Phillips, 2006), which leaves room open to determine other possible success metrics, specifically intangible, non-financial ones. This study suggests that intangible/ non-financial success metrics are tied to the four realms of an experience, as proposed by Pine and Gilmore (1998, 1999, 2001, 2011).

Because ROI may only be appropriate in five percent of meetings and events, ninety-five percent of meetings and events are not being measured in the best possible way. Assuming that meeting and event success and the key traits can be defined, this study looks to define success and these influencing elements. According to Selling Communications (2011), “in serving the meetings market, it's essential to know the factors that meeting planners must bear in mind when doing their job” (para. 10). Critical issues involved in running a successful meeting may include clear and measurable objectives, an appropriate strategy for achieving the objectives, suppliers, incentives, quality, communication, and feedback. For this study, industry subject matter experts...
are asked to define potential critical issues for the meeting and event professional, based on their own documented experiences.

**Evaluation**

O’Neil (2009) asserts that evaluation techniques for the meetings and events industry evolved from models in the public relations field and the adult education/training discipline. A three-level approach, with a focus on output, outtakes, and outcomes is commonly used in public relations (Lindenmann, 2002), while the Phillip’s ROI model was originally developed for the adult education field (Phillips, Myhill, & McDonough, 2007).

**Meetings and Events Evaluation Techniques**

The meetings and events industry represents $263 billion to the United States economy annually (Convention Industry Council, 2011b); the industry brings billions of dollars to the Travel and Tourism industry, which includes industry suppliers, hotels, venues, restaurants, and other industry suppliers (O’Brien & Shaw, 2002), including air transportation, retail, gasoline, recreation and entertainment, car rental, travel services and other tourism commodities (Convention Industry Council, 2011b). Hu and Hiemstra (1996) commented on this spending, “Each dollar of meeting-related primary spending initiates a broad set of economic interactions that brings extra impacts (secondary spending, employment, income, and taxes) in other sectors of a region’s economy,” (p. 64) and their comments are still valid today.

Even with all the spending in the meetings and events industry, organizations historically have not measured the impact of meetings and events. Jeffries-Fox (2005) concluded that only a small proportion of meetings and events are measured (cited in O’Neil, 2009). The most
common reason given for not evaluating the impact of meetings and events is “the lack of know-how amongst organizers” (p. 55). At the time the Jeffries-Fox study was conducted, Amer (2005) commented:

> After years of searching in vain for a reliable method with which to calculate ROI, the meetings and events industry finally seems poised to adopt and effective methodology (the Phillips’ ROI Methodology) that could demonstrate the value of meetings. And that could finally clearly reveal the value of the meeting professional as a strategic member of any organization’s executive team. (p. 31)

Yet, for various reasons, most meetings are not measured for their return on investment (Myhill, 2009; Pulliam-Phillips & Phillips, 2005), and very few meeting programs are measured in consistent ways (White, 2001).

**Kirkpatrick Four-Level Evaluation Approach.** The use of ROI in the meetings and events industry was added to the Kirkpatrick Four-Level Approach. Kirkpatrick (1998) first developed the four-levels of evaluation in 1959. This has reigned as the most popular and primary evaluation method in the training industry (Linder & Woods Hyman, 1999, cited in Davis, 2006).

The Kirkpatrick (19590 levels include reactions, learning, behavior, and results. Reactions (level 1) measures how participants have reacted to the training; learning (level 2) measures what participants have learned from the training; behavior (level 3) measures whether what was learning is being applied on the job; and results (level 4) measures whether the application of training is achieving results.

Kirkpatrick’s model assumes that positive reactions to the training program lead to positive results on learning, which leads to positive effects on behavior, which lead to positive bottom-line results (Kirkpatrick, 1998, 2009). Kearns (2005) argues that the Kirkpatrick model needs to be updated to include a clear measure of tangible value to the organization.
**Return on Investment.** The term ROI comes from the finance and accounting worlds. Pulliam-Phillips and Phillips (2005, p.2) define ROI as the “ultimate measure of accountability that answers the question: Is there a financial return for investing in a program, process, initiative, or performance improvement solution?” ROI measures how effectively the firm uses its capital to generate profit; the higher the ROI, the better (Pulliam-Phillips & Phillips, 2005).

To calculate ROI, Pulliam-Phillips and Phillips (2005) provide the following equation: the net benefit (return) of the meeting or event is divided by the cost of the investment; the result is a percentage:

\[
ROI = \frac{(Program\ Benefits - Program\ Costs)}{Program\ Costs} \times 100
\]

Pulliam-Phillips and Phillips note that while ROI is “the ultimate measure of profitability, basic accounting practice says that reporting the ROI metric alone is insufficient. To be truly meaningful, ROI must be reported with other performance measures (2005, p. 2).

Meeting Professionals International, the largest association of meeting and event professionals, supports the use of the Phillips ROI Methodology for the meetings and events industry (Phillips, Breining, Pulliam-Phillips, 2008). Adapted from the Kirkpatrick model, Jack Phillips (1997) added an additional level, Return on Investment. The ROI step lets companies use a cost-benefit ratio to decide if the program was cost effective. The Phillips ROI Methodology (2006) measurement and evaluation process collects up to six types of data: statistics, scope, and volume (level 0); reaction, satisfaction, and planned action (level 1); learning (level 2); application (level 3); business application (level 4); and ROI (level 5).

Currently, most meeting and event evaluations measure the meeting statistics (Level 0), test the participant’s satisfaction (Level 1), and assess if the skills and knowledge learned were useful (Level 2) (Phillips, Breining, & Pulliam-Phillips, 2008). The outcomes become more strategic in Levels three through five, where Levels three and four assess the short and longer-
term business impact, and Level five calculates the monetary ROI value (Phillips, Breining, & Pulliam-Phillips, 2008). In order to evaluate at each level, it is crucial to collect data at each level (Myhill &Phillips, 2006, Phillips, Breining, & Pulliam-Phillips, 2008). This is where ROI calculation becomes difficult for meeting professionals, as they often do not have access to Level two, three, or four data.

Pulliam-Phillips and Phillips (2005) suggest that the ROI method is only applied to five percent of programs. Only the most important, expensive, or strategic programs need to be assessed at this level of financial accountability. Phillips (1997) and Phillips, Breining, and Pulliam-Phillips (2008) also suggest using “hard” and “soft” data. Hard data, such as costs, time, or sales figures, are easier to find and calculate. Soft data include turnover rates, absenteeism, implementation of new ideas, and other more subjective business impacts.

In addition to ROI, another measure of success includes “The Meeting Design Process,” developed by the MPI Foundation in the early 1990s, and then updated to the Business Value of Meetings in 2011 (MPI Foundation, 2011). It uses similar processes, starting with identifying the stakeholders and separate objectives for each segment of stakeholders, but the Phillips’ Methodology gives a stricter definition of ROI.

The Phillips Methodology for calculating ROI is a comprehensive model that is appropriate for meetings with financial objectives or financially measurable costs and benefits. However, in 95 percent of meetings and events, ROI may not be the best metric for success. Drawing on the literature in the human resources/ training and organization development fields, it may be possible to find ways to calculate success based on intangible experiences.
Pine and Gilmore’s Experience Economy

The meetings and events industry can be segmented in a few different ways. The industry can be viewed by segments, such as Corporations, Associations, and Government, or by the acronym MICE, defined as Meetings, Incentives, Conferences, and Exhibitions. MICE is applied inconsistently with the “E” sometimes referring to events (ICCA, 2013) and the “C” sometimes referring to conventions. “MICE” refers to a particular type of tourism in which large groups, usually planned well in advance, are brought together for some particular purpose. Recently, there has been an industry trend towards using the term "meetings industry" to avoid the confusion with the acronym (ICCA, 2013).

Most components of MICE are well understood, perhaps with the exception of incentives. Incentive tourism is usually undertaken as a type of employee reward by a company or institution for targets met or exceeded, or a job well done. Unlike the other types of MICE tourism, incentive tourism is usually conducted purely for entertainment, rather than professional or educational purposes (SITE, 2013).

This study proposes another classification of the meetings and events industry. Pine and Gilmore (1998, 1999, 2001, 2011) suggest that the economy has progressed from an agrarian, or commodities based one, to an industrial (goods) economy, to a service economy, and finally to an experience economy. Pine and Gilmore (1998, 2011) further suggest that experiences can be sorted into four categories or “realms” of entertainment, education, escapist, and esthetic. Rather than classify the meetings and events industry by segment, it may make sense to divide the industry, for the purposes of evaluation, into Pine and Gilmore’s realms. Meeting professionals in each segment plan educational and entertainment event types already, and these types may share common success metrics. This study looks to see if meetings and events can be classified
into escapist and esthetic events, as well, and what success metrics may exists within those realms.

Pine and Gilmore are not the first authors to theorize and discuss changes in consumer behavior, but have contributed to the conversation started by Toffler, Holbrook and Hirschman, Schulze, and Jensen. In 1970, futurist Alvin Toffler wrote a book called Future Shock, which was a reference to “too much change in too short a period of time”. Toffler (1970, 1984) argued that society “is undergoing an enormous structural change, a revolution from an industrial society to a super-industrial society” In their publication, The Third Wave, Toffler and Toffler constructed a model of historical and social change. The First Wave corresponds to the agricultural revolution, which is followed by the Second Wave of industrial civilization. The Third Wave, starting in the 1950s, relates to the postindustrial, high technology, information economy (Toffler, 1994).

In 1992, Holbook and Hirschman wrote an article linking emotional experiences to products and services. They discussed neglected important consumption phenomena such as “various playful leisure activities, sensory pleasures, daydreams, esthetic enjoyment, and emotional responses” (p. 134).

The first edition of Gerhard Schulze’s "Erlebnisgesellschaft" (The Experience Oriented Society) was also published in 1992. The direct translation into English is difficult, as the German word for “experience” is also “Erfahrung.” “Erlebnis” implies a more “exciting or stimulating experience” (in Glatzer, 1995, p. 86). Schulze comments that in German society, “the dominating concern is not to survive, but to have stimulating experiences” (in Glatzer, 1995, p. 87).

Published around the same time, Jensen (1996) in “The Dream Society,” said it will no longer be enough to produce a useful product. But instead, a story or legend must be built into it, a story that embodies values beyond function.
One way to think about experiences, Pine and Gilmore comment, is to consider two dimensions. The first continuum is customer participation, which ranges from passive to active. The other dimension of experience describes the connection, or “environmental relationship that unites the customers with the event or performance” (Pine & Gilmore, 1998, p. 101).

Pine and Gilmore's thesis has been criticized as an example of an over-hyped business philosophy arising from dotcom boom and a rising economy in the U.S. that was tolerant of high prices, inflated claims, and no limitations of supply or investment. Detractors contrast it with other service economy theses such as Natural Capitalism, in which there is a clear focus on making measurably better use of scarce resources, usually considered to be the basis of economics.

Pine and Gilmore’s thesis has also been criticized by tourism, leisure and hospitality researchers whose theories as to the role of experiences in the economy were already well established prior to the work of Pine and Gilmore, but were not acknowledged outside their disciplines. Further, the concept has already been superseded within much service marketing and management literature by the argument that the value of all goods and services are co-created or co-produced through the interaction of consumers and producers. Therefore, at one level of abstraction, all consumption can be understood in experiential terms.

In 2007, Oh, Fiore, and Jeoung developed a measurement scale for the four realms of experience. They found that “Pine and Gilmore’s four realms of experience offer not only conceptual fit but also a practical measurement framework for the study of tourist experiences” (p. 123).

As the economy has changed and progressed from commodities to services, it has been suggested that selling experiences is the next wave. It may be possible to connect meetings and events to Pine and Gilmore’s four realms of experience and continue to develop evaluation
measures like the one proposed by Oh, Fiore, and Jeoung. The present study suggests that experiences be leveraged as non-financial metrics for meetings and events success.

**Chapter Summary**

The meeting and events industry contributes billions of dollars to the U.S. economy annually. Prominent industry associations, such as the Professional Convention Management Association and Meeting Professionals International, support the measure of meetings and events success with ROI. However, the creator of the ROI Methodology, Jack Phillips, has stated that ROI is only an appropriate measure in five percent of meetings and events. Thus, this study documents the definition of success in meetings and events and the factors deemed critical for success as explained by meeting and event professionals. Additionally, this study aligns success with the realms of as alleged by Pine and Gilmore.
Chapter 3

The Qualitative Study Methodology

As discussed in chapter two, industry literature and trade publications describing the process for planning meetings and events, as well as information regarding the Return on Investment (ROI) methodology, are plentiful. Phillips, the creator of the meeting and event ROI model, has stated that ROI is only an appropriate measure of success in five percent of meetings and events, currently with less than a one percent usage rate (Phillips, et al, 2007). The remaining 95% of meetings and events would benefit from another measure of success, particularly metrics that capture the intangible benefits and non-financial elements that are inherent in the meeting and event planning process.

In addition to filling an evaluation gap for the meetings and events industry, this study stemmed from my interest in evaluation techniques for training programs, and from my experience as a meeting professional. This interest was ignited by my career in the industry, and has continued to live on through my continued relationships with meeting and event professionals through academic and industry functions. At industry conferences, such as the Professional Convention Management Association’s annual meeting, and through various hospitality consulting assignments, I have observed the struggle with evaluation metrics and techniques, and discussed the Phillips’ ROI methodology with industry professionals. These professionals, both industry newcomers and veterans, have expressed feelings of frustration with data collection and analysis when trying to use ROI.

One of the two main purposes of the research study documented here was to allow meeting and event professionals to discuss and define success in the meetings and events that they plan, based on their documented experiences. The secondary purpose was to identify a
connection between event type and evaluation metrics to determine if appropriate success metrics vary per meeting/ event type. Based on my personal experience in the meetings and events industry and my interaction with meeting professionals, I wished to explore potential common success metrics within meeting/ events types, as alleged by Pine and Gilmore (1998, 1999, 2001, 2011), that are focused on entertainment, education, escapism, and esthetics. By grouping meeting and events according to Pine and Gilmore’s model, it may be possible to identify if common success metrics exist within each realm. At least two of the experience realms (education and entertainment) describe event types planned by professionals currently. If common success metrics exist per realm, this could help build a more comprehensive evaluation model for the meetings and events industry; one that could be used in any segment (i.e. corporate, association, or government). Therefore, the intent of this two-tiered, sequential study was to address the study purposes and to answer three research questions.

This chapter discusses the methods and procedures used to explore success definition, success factor identification, and measurement. This chapter contains four main sections: (a) qualitative research design; (b) methodology (grounded theory and interviews); (c) data collection (recruitment, participant descriptions, pilot study, ethics in data collection, role of the researcher, and trustworthiness); and (d) data analysis (open coding, axial coding, and selective coding).

### Qualitative Research Design

The study purposes and research questions were addressed first by a qualitative methodology and secondarily by a quantitative methodology. According to Morgan and Smircich (1980), the use of a research approach, whether qualitative or quantitative, depends on the nature of the phenomena to be studied. The research questions that informed both tiers of this study are as follows:
1. How do meeting and event professionals define success of their planned meetings and events?

2. Do key factors in the planning process exist that contribute to meeting/event success?
   a. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events?
   b. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events?
   c. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events?
   d. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events?

3. If key factors are identified, how are they tracked and measured by meeting professionals?

   Specific success metrics and the relationship between success and meeting/event type are not well documented. Because of the limited documentation and gaps in the research literature, I selected a qualitative approach for the first part of the study discussed here. Drawing from Edmondson and McManus (2007), a qualitative methodology was most appropriate in this study since the research questions were addressing “phenomena that are not well understood” (p. 1155). Edmondson and McManus (2007) discuss a continuum, from mature theory (well-developed constructs and models with specific, testable hypotheses) to nascent theory (topics for which little or no previous theory exists) and suggest that qualitative approaches are more appropriate for the latter. “Nascent theory proposes tentative answers to novel questions of how and why, often merely suggesting new connections among phenomena” (p. 1162). Creswell (2007) suggests qualitative research in order to develop theories when partial or inadequate theories exist for
certain populations and samples. Therefore, a qualitative approach was justified due to the limited documentation of success definition for meetings and events.

**Methodology**

For the study discussed in this paper, I employed a qualitative methodology, specifically using the grounded theory approach to data analysis. To supplement these findings, I employed a quantitative survey technique, discussed in chapters five and six of this document, to corroborate the results that emerged from the first tier of the study.

**Grounded Theory**

Many approaches to qualitative research exist, but I selected the grounded theory approach to answer my research questions. I selected this methodology because it is one that works well when little theory already exists (McLeod, 2001; Neal, 2009). Glaser (1978) provided a key question to address in grounded theory research: what is going on here? Ultimately, I wanted to uncover what is going on with meeting and event evaluation techniques, so grounded theory was appropriate.

Grounded theory is concerned with the generation of emergent conceptualizations into integrated patterns, which are denoted by categories and their properties (Charmaz, 2006; Glaser 2008). Grounded theory generates or discovers theory by focusing on analyzing a phenomenon that relate to a particular situation (Creswell, 1998, 2007). Strauss and Corbin (1994) point out that the value of the grounded theory lies in its ability not only to generate the theory, but also to ground that theory in data. Denzin and Lincoln (1998) add that the grounded theory method of research consists of systematic inductive guidelines for collecting and analyzing data to build
theoretical frameworks that explain the collected data. Glaser (1978) lists four features of grounded theory: (1) a theory must have fit and is faithful to the everyday realities of a substantive area, (2) a theory must have relevance because it allows core problems and processes to emerge, (3) the grounded theorist must search for and discover the relevance of his or her data, and (4) a theory should be able to explain what happened, predict what will happen, and interpret what is happening in an area of substantive or formal inquiry. Strauss and Corbin (1994) add two additional features of grounded theory by stating that theories are always traceable to the data that gave rise to them, and grounded theories are very fluid, because they “embrace the interaction of multiple actors, and because they emphasize temporality and process” (p. 274).

**Interviews.** To collect the data needed to address the study purposes and research questions, it was important to select an appropriate collection technique. Yin (2009) suggested six different techniques, including documentation, archival records, interviews, direct observation, participant, observation, and physical artifacts. I decided to collect data by interviewing meeting professionals. Neal (2009) advises that interviewing is more than just asking a question and receiving an answer and Berg (1989) defines interviewing as a conversation with a purpose of gathering information. Charmaz adds that interviews “provide particular accounts from particular points of view that serve particular purposes” (2006, p. 47). Perakyla (2008) states that interviews consist of accounts given to the researcher about the issues in which they are interested and adds that most qualitative research is based on interviews. For the study discussed in this paper, I felt that interviewing was the best method for data collection. Analyzing archival records and physical artifacts would not help to uncover a definition of success for meeting professionals, nor would observation. Observing a meeting professional planning a meeting/ event would not help answer the research questions; it would merely allow me to watch the planning process.
To prepare for the interviews, I determined the interview type, developed a list of interview questions, determined the order in which the questions would be asked, and practiced conducting the interview.

**Interview type.** To prepare for data collection, I needed to consider the interview type that would produce rich data, but also be considerate of a population that has limited time to share. The population of meeting and event professionals is generally very busy, so I was concerned about the recruitment of participants if the time commitment was too lengthy.

Babbie (1983), Denzin, (1978), and Gorden (1987) discussed three types of interviews, as the standardized (formal), unstandardized (informal), and the semi-standardized (guided- semi structured) interview. With my concern for participant time commitment, I selected the standardized interview format, as these interviews use a formally structured schedule of questions (Berg, 1989) and the questions ‘scheduled’ in the interview protocol would address the research questions sufficiently.

**Interview questions.** After determining the interviews would be formal and structured, it was important to develop comprehensive questions to ask the participants. I crafted my interview protocol using three types of questions, as suggested by Berg (1989). I used essential questions that “exclusively concern the central focus of the study and are geared toward eliciting specific, desired information” (p. 21) to address the specific research questions. For example, to address the first research question, *how do meeting and event professionals define success of their planned meetings and events*, I asked, “how do you define a successful meeting/ event?” This question was specifically targeted to answer the first research question.

In addition to essential questions, I included extra questions, which are “roughly equivalent to certain essential ones, but worded slightly differently” (Berg, 1989, p. 21). The extra questions were included in order to verify the reliability of responses. An example of an extra question in my interview protocol is, “How do you define a successful meeting/ event
professional?” This question would explore the relationship between the definition of success and meeting professionals.

Finally, I included “throw-away” questions in order to build rapport with my participants and collect demographic information (Berg, 1989). Questions regarding gender, employment, length of employment, and professional certifications were meant to put the participants at ease, but also to allow me to verify that the participants were currently industry professionals, and had work experience planning meetings and events. In addition, holding a professional certification, like the Certified Meeting Professional designation, was an interest of mine as a researcher, as this told me that a participant would have a certain familiarity with industry jargon and processes like ROI.

*Interview practice.* Once the draft protocol was complete with essential, extra, and throw-away questions, I reached out to meeting and event faculty colleagues to practice my interview skills. I am a member of the faculty task force for both the Professional Convention Management Association and Meeting Professionals International, which consist of global faculty members that teach meetings and events courses in either two- or four-year collegiate programs. I selected faculty colleagues rather than industry professionals to conduct practice interviews because I wanted to practice with participants who were well-versed in proper interviewing techniques. This decision may be viewed as a study limitation, because I did not obtain feedback from industry professionals.

Two faculty members agreed to serve as reviewers, so I practiced delivering my interview protocol for these colleagues over the telephone and received feedback on my voice quality, the wording and length of the questions, and the amount of questions. My reviewers were both tenured faculty at four-year institutions with meeting and events programs for undergraduates, and had experience conducting qualitative research and interviewing research participants.
The reviewers expressed that my voice quality was “strong and confident, yet, approachable.” My participant interviews would be delivered via telephone due to time and money constraints, so it was important that I was confident and approachable over the phone. One opportunity I needed to address was my tendency to get “excited” about the content and interrupt the participant. I made sure to make this a priority when collecting data from my participants. I focused on taking notes while the participants were speaking. When the participant had finished speaking, I silently counted to five before asking my next question.

My reviewers liked the majority of my essential questions, but had me remove questions that were somewhat leading. With grounded theory, the desired result is data emergence, (Charmaz, 2006) and questions that put specific ideas into the minds’ of the participants may introduce bias. For example, I initially asked if escapist meetings implied incentive travel. My reviewers thought I should wait to see if the participants explored that connection during the interview.

My reviewers also suggested that I limit the number of questions due to my concern for the participants’ time. By eliminating some of the “leading” questions for each of the four experience economy quadrants, I was left with six interview questions (four with several sub-questions) and four demographic questions. My reviewers confirmed that my interview protocol would allow for enough time to obtain data for each of the three research questions.

Data Collection

Recruitment

For the first tier of this study, I chose to draw potential interview participants from the population of executive leadership (either a president or chair) from the member organizations of
the Convention Industry Council (CIC). The 31 member organizations of the CIC represent over 103,500 individuals and 19,500 firms and properties involved in the meetings, conventions, and exhibitions industry.

The CIC was selected as a purposeful sample because the member organizations span various industries and event types (i.e. education, entertainment, escapist, and esthetic) but share the common bond of meeting and event planning. According to Merriam (2009), purposeful sampling “is based on the assumption that the investigator wants to discover, understand, and gain insight, and therefore must select a sample from which the most can be learned” (p. 77).

According to Spradley (1979) “good informants know their culture so well they no longer think about it. They do things automatically from years and years of practice” (p. 47). With Spradley’s thoughts in mind, I selected executive leadership of the CIC member organizations for two reasons:

1. The members of their respective organization vote the executive leadership in. This demonstrates confidence in leadership qualities and knowledge from each of organizations’ general membership.

2. The executive leadership has a lengthy tenure in the meetings and events industry, with a variety of experiences to share. Spradley (1979) suggests that informants have at least one year of full-time involvement in a cultural scene with current involvement. It is important to interview people who have a first-hand, current involvement in the cultural scene. To serve, the executive leadership has to have tenure and current involvement in the meetings and events industry.

In order to recruit participants, I began by reviewing the CIC membership list (see Appendix B). For each organizational member, I viewed the organization’s website and selected the executive board member listed with a title of “President” or “Chairman.” Next, for the 31
selected executives, I searched for an e-mail address or other contact information listed on the organization’s website. After completing this search, I obtained a list of 25 potential participants. I sent each of the 25 leaders a recruitment message (see Appendix A), requesting their participation in a one-hour telephone interview. Of the 25 messages sent, 10 people responded, but after hearing about the window of time the interviews were to be conducted, I recruited 6 participants. Two additional participants agreed to be interviewed via e-mail. Because these interviews would be in a different format, I used the information collected from the e-mail participants to check for data saturation.

I set up phone interviews with the six participants throughout April 2013, and asked for the e-mail participants’ information to be returned by the end of April, 2013.

**Participant Descriptions**

In order to maintain confidentiality, I did not collect organization information (including name of CIC member organization or employer) from the participants, but I collected general demographic information. In this text, the two males and six female respondents will be referred to as “Respondent A,” “Respondent B,” and so forth.

The six phone participants and both e-mail participants are currently employed meeting professionals, with over 10 years of industry work experience, and a member of an executive leadership team of one of the CIC member organizations. Three of the participants (A, B, and F) identified themselves as meeting professionals working for an association. One (C) identified as working for a corporation, one (D) was an independent planner, and one (E) identified an “other” employer. Neither of the e-mail participants disclosed employment titles. Finally, five out of the eight participants had obtained the CIC’s most prestigious certification, the Certified Meeting Professional designation.
Pilot Study

Prior to the start of data collection with the study participants, a pilot study was employed to ensure sound interview techniques. Through a convenience sample, I conducted a face-to-face interview with a participant located in Central Pennsylvania, who had more than 10 years of meeting and event industry experience. The pilot study participant was on the executive leadership team of a CIC organization, but was not the president or chair. Working currently in a university setting, the pilot study participant had also obtained the Certified Meeting Professional designation.

The pilot interview was conducted in early April, 2013. Prior to the interview, I asked the participant to take note of my active listening techniques as suggested by Spradley (1979) and Whyte (1984), any time I interrupted the conversation, or attempted to provide advice, pass moral judgment, or use value statements. The interview took 70 minutes to complete. I took written notes of the participant’s answers to my questions, but did not record the session, as I would not be recording the telephone interviews. After the completion of the interview, the participant said that I did not give advice or pass moral judgment, and I avoided the use of value statements (Whyte, 1984). In addition, I employed active listening techniques as suggested by Spradley (1979) and Whyte (1984) by offering repeated explanations and restating the participant’s comments. The participant commented that I was “easy to talk to and only interrupted once.”

I transcribed my notes immediately following the pilot interview. Before completing any of the telephone interviews, I practiced coding this data set. I sent a sample of the transcription to a faculty colleague in Indiana, who conducts qualitative research, in order to compare coding techniques. This sample coding, comparing my codes with my second coder’s work is in Appendix C.
Ethics in Data Gathering

According to Spradley (1979), it is important not to exploit research participants by safeguarding their rights, interests, and sensitivities, communicate research objectives, protect their privacy, and make all reports available to them. During my pilot study and telephone interviews, I made sure to act ethically in regards to data collection and reporting. The ethical considerations that I paid close attention to included confidentiality, informed consent, additional security measures, interview bias, my role as researcher, and trustworthiness.

Confidentiality. I was careful to protect the confidentiality of all the participants in order to guard the integrity of this study. In reporting the results, the participants are referred as a “respondent A, etc.” Information with respondents’ identities, e-mails, and phone numbers are securely maintained in a locked place. Approximately one-year post study (December, 2014), I will destroy the participant list and notes about this study.

Informed consent. Prior to data collection in the pilot study, telephone interviews, and e-mail interviews, I obtained informed consent. Informed consent is a process that advises study participants of their rights to confidentiality, voluntarily providing information, and stopping the interviews at any time. I used phrasing from Penn State University’s Institutional Review Board, which I read to each of the participants and provided in writing to the pilot study and e-mail participants. I did not obtain a signed copy from the telephone participants, but rather a verbal agreement, since I did not meet them face-to-face. The pilot study and e-mail participants signed the forms in agreement.

Additional security measures. Other security measures that I employed during data collection included: (a) taking all phone calls on my land line and not my cell phone; (b) calls were taken in my home, when I was alone; and (c) notes were taken on my home computer and stored on a flash drive, which was kept in a locked drawer.
**Interview bias.** According to Oakley (1981), bias occurs when interviews are not conducted the same way, with resulting differences in the data produced. While this generally speaks to multiple researchers collecting data on a single project, I used this guiding principle to ensure that each of my interviews was conducted in the same manner. I started by selecting the structured interview approach and made sure to ask the same questions in the same order with each participant. Although the participants brought up topics that could have been explored further, I took note of these items for future studies, rather than risk each interview being different.

**Role of the researcher.**

After graduating with an undergraduate degree in Hotel, Restaurant, and Institutional Management, I spent 12 years in the meetings and events industry, primarily on the supplier side. A supplier, as defined by the CIC is a vendor or a contractor offering facilities, products and/or services (Convention Industry Council, 2011). I knew as early as my first hospitality class that I wanted to be a meeting professional, and I was lucky to carve out a career in catering and sales. While the industry has matured since my time of employment, I recall struggling with evaluation metrics, just as today’s professionals do. This study emerged from my experiences with evaluation, as well as my observations of current professionals’ struggles. My experiences and observations led me to explore the viability of using Pine and Gilmore’s Experience Economy framework for an industry evaluation model.

I consider myself to still be a member of the meeting and event industry population, as an active member in the Professional Convention Management Association, Meetings Professionals International, and a Certified Meeting Professional. Prior to the start of each interview, I
disclosed my employment background and my continued membership in the meeting professional community.

Currently, I am a hospitality consultant for a small management company. My priorities focus on human resources, training, and evaluation for hotels and restaurants. Reinharz (1979) states, “I have learned that I have projected my own conflicts on to the profession while I incorporated the profession’s dilemmas into my personal identity” (p. 381). I can agree with these sentiments, as I tried not to allow my membership in the meeting professional community to bias my interviewing. I controlled bias by not offering value statements or adding my agreement (or disagreement) to comments during the interviews. In qualitative research, the interviewer can serve as the research instrument, so I purposely did not request participation from professionals that I am close with and have not met any of my participants prior to this study. My concern was that familiar participants may have felt the need to answer my questions to please me, rather than honestly, resulting in biased research results.

Trustworthiness.

Data derived by using qualitative methodology have different tests of rigor and quality than data collected through quantitative methods. Quantitative studies are commonly judged by validity and reliability (Golafshani, 2003). Healy and Perry (2000) assert that a study should be judged for quality by its own paradigm’s terms. To ensure reliability in qualitative research, examination of trustworthiness is critical (Lincoln & Guba, 1985; Seale, 1999). Qualitative results are considered trustworthy if the study has been rigorous and passes checks with validity and reliability (Lincoln & Guba, 1985; Merriam, 2009). Lincoln and Guba summarize trustworthiness as persuading the audience that the findings are worth paying attention to (1985, p. 290).
Lincoln and Guba (1985) posed four checks to test trustworthiness: truth-value (credibility), applicability (transferability), consistency (dependability), and neutrality (confirmability).

**Truth-value (credibility).** Truth-value establishes confidence in the “truth” of the findings of a particular inquiry within a certain context (Altheide & Johnson, 1998; Lincoln & Guba, 1985). Truth-value is similar to internal validity, as internal validity connects the study findings to reality (Merriam 2009). Merriam suggests different ways to verify internal validity including triangulation (data collection from multiple sources), member checks (feedback is obtained from study participants), adequate engagement (saturation of data), and peer review (findings are reviewed by peers).

In this study, I have employed Merriam’s suggested internal validity checkpoints. I used multiple methods to collect data. I collected data via interviews and used a questionnaire to collect information and compare it to the results of the interviews. As chapter six of this paper will describe, many of the questionnaire responses matched the results of the interviews. I also employed member checking. After each of the six phone interviews, I typed the notes and sent them to each participant. I asked if s/he would review the notes to ensure that I had captured the interview answers accurately. All six participants agreed that the data collected was the same as the answers they had expressed in their interview.

The next check of truth value/ internal validity is adequate engagement. After I had transcribed and coded the six telephone interview participants, I then coded the two e-mail interviews. There were no new codes or themes in the e-mail contributions. Because no new information emerged, I believe that I had reached data saturation, or adequate engagement. Finally, I employed peer review by sending two of the six telephone participant’s transcripts to my second coder. Similar codes and themes emerged with the review of the second coder.
**Applicability (transferability).** Applicability is described as the extent to which the findings of a particular study have applicability in other contexts (Altheide & Johnson, 1998; Lincoln & Guba, 1985). Applicability can be compared to external validity. Yin (2009) describes validity as the generalizability of the study’s findings. My use of a second data collection method, a questionnaire with a random sample, shows that the findings from the interviews can be applicable to another population.

**Consistency (dependability).** Lincoln and Guba (1985) describe consistency as finding similar study results with similar respondents in a similar context. Campbell (1996) notes that consistency of data will be achieved when the steps of the research are verified through examination of raw data, data reduction, and process notes. In this study, I employed a second coder through the three stages of coding that found similar results and drew similar conclusions.

**Neutrality (confirmability).** Neutrality shows the degree to which the findings were determined by the participants, not the researcher (Lincoln & Guba, 1985). During the pilot study and prior to the telephone interviews, I had the participant review my neutrality. The feedback I received stated that I did not add value statements during the interview. I also conducted member checks after the telephone interviews to ensure that my transcriptions reflected what the participants had actually said. In all cases, neutrality was not a problem.

**Data Analysis**

Creswell (1998) described the general structure of grounded theory as follows: (a) introduction: problem and questions; (b) research procedures: grounded theory, data collection, analysis, and outcomes; (c) open coding; (d) axial coding; (e) selective coding and theoretical propositions and models; and (f) discussion of theory and contrasts with extant literature. After the six telephone interviews and two e-mail interviews were completed, data was transcribed, and
member checks were performed (Lincoln & Guba, 1985). I used Creswell’s structure as a guide for data analysis. Creswell (1998) described three phases of data analysis in grounded theory. The first phase is open coding, where the information is categorized and the properties and dimensions of the data are examined. Open coding is then followed by axial coding, with a purpose to identify a central phenomenon, explore causal conditions, specify strategies, identify the context and intervening condition, and delineate the consequences for the central phenomenon (Creswell, 1998). After the categories are identified in axial coding, selective coding takes place. Selective coding identifies a story line and integrates the categories in the axial coding. The final step, according to Creswell, is to visually portray a conditional matrix that describes the conditions influencing the central phenomenon.

Open Coding

After transcription and member checking, I began analyzing the data using the open-coding approach. According to Strauss and Corbin (1998), in open coding the data are examined line by line to define actions or events within data. Strauss and Corbin (1990) advise asking questions “in which one asks who, when, where, what, how, and why questions of the data and begin to identify constructs that arise from the data, documents their properties, and notes recurrent themes” (cited in Purdy & Gray, 2009, p. 359). To conduct this first-order analysis, I did not impose a priori codes, but rather let the data determine common codes.

Glaser and Strauss (1967) suggest that coding need consist only of noting categories on margins, but can be done more elaborately. I followed this advice by highlighting information that I thought was important. I color-coded common words and used the word count feature to keep track of emerging categories, and made comments in the margins about why I thought the data was important. Some of the codes were easy to identify, such as “stakeholders” and
“surveys,” while others took a little longer to emerge, such as “objectives” and “learning styles.” I kept a running list of my initial codes in a Microsoft Word document, and compared my list with my second coder. I had asked my second coder to document her coding in a similar manner to mine. This way, if our first coding list was vastly different, I could see where the differences occurred. A comparison of both of our open code lists, revealed that my second coder had identified important data that was only mentioned once in the transcripts, such as “networking,” “brand management,” or “Twitter.” I learned to include items in open coding, even if they were only mentioned once, because these data may develop into important themes later in the analysis.

**Axial Coding**

After open coding is complete, the second step in data analysis is axial coding (Creswell, 1998), which is aimed to make conceptual connections between a category and its subcategories. Axial coding is "an integrative process of selecting the core category, systematically relating it to other categories, validating those relationships by searching for confirming and disconfirming examples, and filling in categories that needed further refinement and development" (Strauss & Corbin, 1990, p.116). As recommended by Strauss and Corbin (1990), axial coding involves documenting patterns and themes in the data, so I grouped codes together into common themes and looked for relationships within the data. I continued this process of relationship identification until I examined all of the interview data. I documented my codes in Microsoft Word, and once again compared my analysis with my second coder. I liked some of the concise wording that my second coder had used. For example, I had used “setting goals and objectives in the beginning of the planning process” as an axial code, but shortened it to “pre-determined goals and objectives” based on comparison with my second coder.
Selective Coding

In selective coding, core categories, propositions, or hypotheses are developed (Merriam, 2009, p.200). During the third phase of analysis, the codes and categories were sorted, compared, and contrasted until all the data were accounted for in the core categories and no new codes or categories would be produced (Creswell, 1998; Merriam, 2009). This point is known as data saturation. For example, when making sense of the codes for escapist events, codes such as “exotic locale,” “getting away from home,” “not at work,” collapsed into the theme “getting away from it all.” The categories of education and entertainment had more themes emerge, because the participants were more familiar with the terminology of educational and entertainment meetings and events than they were with the terms escapist and esthetic.

When I had finished identifying my selective codes, I called my second coder. We discussed each of the themes that emerged, as opposed to just reading comments on paper. It was the verbal discussion between us that gave me the confidence that my data was saturated, and all possible themes were explored from the data. Once the selective coding process was complete, a visual matrix (Creswell 1998) was created to display the conditions influencing the phenomenon of meeting and event success. The visual matrix is discussed further in chapter seven.

Chapter Summary

This chapter detailed the methodology from the first phase of this two-tiered, sequential study. While conducting interviews with meeting and event industry leaders, I recorded their answers about how a successful meeting or event is defined, as well as their descriptions of key factors needed to achieve success in educational, entertainment, escapist, and esthetic meeting/event types. The participants also explored ways to track and measure the identified success
traits. After coding the interview data, I organized the participants’ information into themes that will be explored in the next chapter.
Chapter 4

The Qualitative Study- Results

Chapter four presents the results of the first tier of this study, the qualitative study, in three sections. The first section reviews the study’s purpose, research questions, research method, and data analysis. The second section provides the findings for each of the three research questions, and the third section summarizes the findings for each research question in a table.

Review of the Study

This study’s primary purpose is to have meeting professionals discuss and define success in the events that they plan, based on their documented experiences, and identify key (and potentially non-financial) planning factors that help create success.

Secondarily, this study looks to identify a connection between event type and evaluation metrics to determine if appropriate success metrics vary per meeting/ event type. Based on my personal experience in the meetings and events industry and my interaction with meeting professionals, I had learned that regardless of industry segment (i.e. corporate, association, government, etc.), professionals plan similar types of events. Based on my industry interactions, commonality among meetings and events often include education, entertainment, and networking components.

The following research questions were used to address the multiple purposes of this study:
1. How do meeting and event professionals define success of their planned meetings and events?

2. Do key factors in the planning process exist that contribute to meeting/event success?
   a. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events?
   b. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events?
   c. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events?
   d. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events?

3. If key factors are identified, how are they tracked and measured by meeting professionals?

Six participants, all part of executive leadership from member organizations of the Convention Industry Council (CIC), were interviewed by the researcher via telephone with the objective of exploring the multiple study purposes and research questions. During the hour-long interviews, the participants discussed the definition of successful meetings and events from their perspective and experience. The interview questions were structured to explore potential common factors of successful educational, entertainment, escapist, and esthetic events.

**Research Findings**

When I developed the interview protocol, my intent was to explore, without judgment, potential answers to the three research questions by allowing the participants to explore and comment on their meeting and event planning experiences. Each participant was asked the same
questions, in the same order. This section discusses the common themes that emerged from each of the six interviews, as well as quotes from the participants in support of the themes presented here.

**Results for Research Question 1**

For each interview, I explained that I was interested to see if meeting and event success varied by event type. For the first research question I introduced the topic, by telling the participants, “The first two questions will look to explore how meeting and event professionals describe success.” In order to explore the first research question, “How do meeting and event professionals define success of their planned meetings and events,” the participants were asked two open-ended questions.

- How do you define a successful meeting/ event?
- How do you define a successful meeting/ event professional?

When the participants were asked to define a successful meeting/ event, six categories emerged from their responses.

**Attendance.** When asked to define a successful meeting or event, each of the participants discussed attendance, but not everyone shared the same opinion. One participant answered:

*When attendance is good. If participation by many is a goal, then attendance would be a mark of success.* (Respondent A)

Another participant stated:

*Attendance, yes, that’s important, but it is successful when all the stakeholders find benefit from attending. Size does not dictate success - it depends on the objectives of the meeting and the targets for participation. Simply put, they are better having participated in the event.* (Respondent B)

While another participant offered a different opinion:
Come on! You can have a large event and have it go horrible. The amount of attendance is irrelevant to the success of your event. (Respondent D)

Another participant agreed with Respondent D:

Attendance doesn't determine the success of a meeting. You can have poor attendance but present excellent information but there are just not a lot of people to appreciate the information that is being presented or benefit from the knowledge that is being shared. (Respondent E)

Evaluations (Attendee). Evaluations, generally defined as a post-event survey completed by meeting/ event attendees, were mentioned as an indicator of success. As with the comments about attendance, opinions were mixed regarding the direct relationship between evaluations and success.

A participant stated:

You know you had a good day when evaluations are exceptional and no glitches are obvious to attendees. (Respondent A)

Another participant commented:

Evaluations are a good indication of a successful meeting, but not the only indication. You can learn a lot from negative evaluations. (Respondent E)

Another participant added to that thought:

Yeah, evaluations are helpful, but you know no one fills them out. My boss insists that I give them out, but the only people who fill them out and send them in are the ones with issues. Of course. (Respondent F)

Meeting pre-determined goals and objectives. After reviewing and analyzing all the interviews, pre-determined goals and objectives was the most prevalent comment relating to meeting and event success, with every participant identifying the importance of setting goals and objectives early in the meeting/ event planning process.

One participant stated:

One in which all stakeholders needs are met. (Respondent A)

Another participant stated:
A meeting or event is successful when the predetermined goals and objectives have been reached or exceeded. Also, it would be unethical for an event planner to shift objectives in order to claim the meeting was successful. (Respondent B)

A third participant corroborated the importance of meeting objectives:

There are many different indicators of success in meetings. Success is determined by meeting the goals/objectives of the event. If professional development and/or learning is the goal, then attendee satisfaction would be a better indicator than attendance, etc. (Respondent C)

Finally, this participant noted:

The success of an event/meeting is based on the pre-determined mutual agreement of the event host(s) and meeting professional in conjunction with the feedback of the attendees and suppliers. (Respondent D)

**Learning styles.** Several participants mentioned the use of a variety of auditory and visual learning styles as markers of successful meetings and events.

One participant commented:

The meeting planner has to know the audience and the best way to deliver information. Some of my groups would die trying to listen to a speaker without a PowerPoint. But, I have friends that plan retreats and team-building events; those groups need action, not lectures. (Respondent D)

Another added:

Visuals seem to impress on the mind along with important audio. (Respondent A)

Another participant began to differentiate meeting types with this comment:

An auditory learning style is the best delivery method for a successful education meeting/event (Respondent F)

There was some conversation with several of the participants about the use of technology and learning styles:

Auditory and visuals are important, just look at my A/V bill! But I think it’s worth mentioning the importance of working technology. It doesn’t matter if I have the best speaker, and my group responds well to auditory cues. If my speaker’s microphone doesn’t work, then forget it. There go my ‘evals’ and I’m getting phone calls the next day. (Respondent D)

Another participant backed this up
Technology should be on the list to judge a site’s success, not mine. But, it doesn’t work that way. If technology fails, I can’t get Internet, or a link to work, unfortunately that reflects on me. (Respondent B)

Effective event management. Most participants disclosed that they are good, and effective, at what they do. There were some slightly exasperated comments about not being recognized for the job that they do, the problems they solve, or the “fires they put out.”

When asked to explore the definition of a successful meeting professional, one participant merely stated:

Me. (Respondent A)

Others were able to elaborate more:

A successful meeting/event professional is someone who is able to take the predetermined goals and objectives and manage them effectively to get the desired result. (Respondent B)

And:

One who is knowledgeable, committed to excellence, and knows how to use all resources to their fullest advantage. But, a meeting professional is successful for a number of reasons, not just good management of resources. (Respondent F)

Return on Investment. Only one of the six participants in the interviews mentioned Return on Investment (ROI). Because only one of the eight participants (the six telephone and two e-mail) mentioned ROI, I did not include it as an emergent theme. I thought it was important to include in my findings for two reasons. First, it is possible that only one participant mentioned ROI, because it is currently the methodology taught for evaluation in the meetings and events industry. Perhaps ROI is so entrenched in the minds of professionals that they didn’t even think about it during the interviews. Second, it is possible that the participants felt ROI is not a factor of success. The response regarding ROI:

A successful meeting is determined by the Return on Investment. Sorry that I had to say it, but it’s true. (Respondent F)
**Summary for Research Question 1.** By consensus, the participants identified “meeting pre-determined goals and objectives” as a definition of meeting and event success. Other themes, such as attendance, positive attendee evaluation (feedback), appropriately matching learning style to the audience, and effective use of resources, were explored as components of success.

**Results for Research Question 2**

The majority of the interview was spent addressing potential key success factors in the planning process per meeting/event type. The participants were asked the following for each of the four meetings types, as proposed in Pine and Gilmore’s framework:

- From your knowledge and experience, please define an educational meeting/event.
- Have you planned an educational meeting/event?
- What types of educational events have you planned or attended?
- What are the key traits and elements in the planning process that contribute to educational meeting/event success?
- How are these key traits and elements currently identified, tracked, and measured?

**Educational meetings and events.** All of the participants had planned an educational meeting or event in their career, ranging from annual conferences to professional development workshops and seminars. When asked to define an educational meeting/event, the participants focused on the delivery of content.

One participant stated:

*A meeting where retention of content is paramount. (Respondent A)*

Another added:

*An educational meeting or event would include a list of deliverables that attendees will receive after they attend. It would include audio, visual and interactive learning. (Respondent C)*
Another participant reinforced the communication of content:

*A meeting where the primary purpose of the meeting is to impart/communicate knowledge to participants.* (Respondent E)

When asked to address key traits and elements in the planning process that contribute to educational meeting/event success, several themes emerged.

*Location.* The venue and room set-up were discussed as key success traits in educational meetings.

One participant commented:

*Ensuring the proper VENUE for the meeting...one where MEETINGS are their business not bedrooms.* (Respondent A)

Another participant agreed:

*The venue can play a very big part in the success of a meeting as the right atmosphere will contribute to a meeting's success.* (Respondent E)

There was a difference of opinion:

*A successful meeting isn't determined by the venue. The venue will add to its success but doesn't necessarily dictate the end result. A successful meeting can take place anywhere as it is the content and the audience participation that will dictate its' success.* (Respondent C)

Another participant went in another direction:

*I feel as though depending on the size of the meeting, a classroom style set up within a meeting space may be the best way to educate the attendees.* (Respondent D)

*Goals and objectives.* Conversations involving goals and objectives were continued from earlier in the interviews. The participants felt strongly about the connection between pre-determined goals and objectives and meeting success.

*You need to have clear goals and objectives with the meeting/event. You need to make sure the agenda is doable, and the speakers/facilitators understand the objectives and schedule.* (Respondent B)

*Learning styles.* The most prevalent theme in the discussion of educational meetings and events was that of learning styles.
One participant said:

*Well organized, interesting, geared to the participants knowledge and experience, highly participatory, time to share/learn with other participants, good takeaways, specific action steps and plan to put elements learned into daily practice. That’s success in a nutshell.* (Respondent C)

Another participant added:

*In person face-to-face learning, I feel is the best. In my experience, the retention is greater. But, auditory and visual are both needed - one is not the best - people learn in different ways so both are needed.* (Respondent A)

Agreement came from two other participants:

*The best method should be a combination of auditory, visual, and interactive learning. None of these three are perfect on their own. People learn in different ways so auditory versus visual versus interactive learning is different for each person. I personally think you learn more by being interactive but that may not be the best for my co-worker.* (Respondent F)

*People learn in a variety of ways so there is no way you can say any method (auditory, visual, etc.) is the preferred.* (Respondent B)

**Network building.** Only one participant commented about networking. As with ROI, I did not include this as a theme. However, from my experience with meeting professionals outside this study, I can confirm that network building is often a priority. I have spoken to professionals during educational meetings that have selected to skip some of the content in order to network. The comment about network building:

*Some attend education meetings to meet others and expand their personal learning network. Inclusive learning is the most effective education-based meeting or event.* (Respondent D)

**Content retention.** All of the participants agreed that content retention was a priority for educational meetings and events.

One participant summed it up:

*The key to a successful educational event is whether attendees can retain and apply what they have learned.* (Respondent A)
Entertainment meetings and events. All of the participants had planned an entertainment meeting or event in their career, ranging from receptions, dances, press conferences to special event dinners for corporate customers. When asked to define an entertainment meeting/event, the participants focused on informality.

One participant said:

An event (not a meeting at all) where fun is the goal. (Respondent A)

This was confirmed by another:

One where the primary purpose is providing an experience that is fun, engaging and acts as a reward to participants. (Respondent C)

Another participant stated:

An entertainment meeting/event is usually less formal, and is connected to a marketing or branding message. (Respondent F)

When asked to address key traits and elements in the planning process that contribute to entertainment meeting/event success, several themes emerged.

Amenities. Most participants agreed that it was an importance indicator of success to have amenities.

One participant stated:

Good sound system and excellent food/refreshments. Yup, that’s entertainment. (Respondent A)

Another agreed in some additional detail:

The extras are important, especially for entertainment events. The opening and closing sessions always elicit positive feedback when there is a good variety of tasty food, plenty of beverages, and lively entertainment, whether it be a DJ, band, or other type of artist. (Respondent E)

Balance. In addition to fun, the need for a balanced program was discussed.

A participant mentioned:

Schedule and timelines are pretty important, and making sure there is a balance of "program" time to networking time. (Respondent D)
Excitement. A sense of successful marketing was mentioned, typically in the form of attendee pick-up.

A participant commented:

*Creativity, knowing your audience, newness, building excitement. All that stuff goes into a successful entertainment event. I’ve planned concerts and festivals, and it’s important to create excitement for your event. Especially you’re your event is an annual one- you have to make it look fresh, new, and exciting every year or you’ll lose interest.*

*(Respondent C)*

Escapist meetings and events. None of the participants were familiar with the term “escapist” as a descriptor for a meeting or event, and therefore the participants answered that they hadn’t planned an escapist meeting or event in their career. But, when asked to define an escapist meeting/event, the participants focused on the idea of “getting away from it all.” When asked to address key traits and elements in the planning process that might contribute to escapist meeting/event success, one primary theme emerged.

*Escape. It was hard for the participants to get away from the word “escape.”*

One participant said:

*Let’s see, one in which participants get away from normal routine and responsibility. They escape normal boundaries and are more free to experiment outside the norm.*

*(Respondent B)*

Another simply said:

*Getting away from it all.* *(Respondent A)*

Another participant pondered location:

*Maybe an escapist event would be one that is in a great location, like Hawai’i. Or some kind of adventure. Or a cruise. I don’t know who can get away with planning events like that, though. I have to be very careful in what bids I can accept.* *(Respondent F)*

Esthetic meetings and events. As with the term ‘escapist meetings,’ the participants were unfamiliar with the term “esthetic” as it related to a meeting or event. Only one of the participants had planned an esthetic event, so the interviews focused mainly on the definition.

The participant that had planned an esthetic event commented:
I think to some extent all meetings have this element. Esthetics are important for any meeting. (Respondent C)

To define an esthetic meeting, the participants offered the following:

One participant asked:

A pretty meeting? (Respondent A)

Another participant stated:

One in which to senses of the participants are engage on all levels. Where how everything looks, feels, tastes, smells and the emotions evoked are considered. (Respondent C)

Details. The details that are a priority in other meeting types were discussed by the participants.

One participant said:

Esthetic meetings involve close observation to detail, time to really consider and the money and creativity to go for it! (Respondent C)

Another participant agreed:

I've hosted many successful meetings that are in a room with awful carpet and bad paint. An aesthetic meeting could engage one or more of the senses. It's about details. (Respondent F)

A participant added:

I do believe that esthetics play a huge role in attendee impressions and participation about the said company or organization. (Respondent D)

Summary for research question 2. By applying Pine and Gilmore’s experience quadrants to the meetings and events industry, participants were able to discuss four different meeting/event types and the key factors in successfully planning them. Participants had much experience planning educational and entertainment events, so many success themes emerged for these two types. Potential success elements for educational meetings/events include location, goals and objectives, learning styles, network building, and content retention. Successful
entertainment meetings/events were marked by amenities, balance between networking and ‘playing’, and excitement (attendee pick-up).

Escapist and esthetic events were difficult typologies for the participants to explore. The terms ‘escapist’ and ‘esthetic’ were part of Pine and Gilmore’s framework, and have not been used in conjunction with meetings. Most of the participants were unfamiliar with them, but some commented that the four classifications were an interesting way to look at the industry. When discussing escapist meetings/events, the participants identified a “getting away from it all” theme. And, details were an important theme when exploring esthetic meetings/events.

Results for Research Question 3

The discussion around measurement of the identified key success indicators was tied into the conversations around the four event types. The measurement tactic most cited by the participants was post-event attendee surveys, even though the participants complained of low response rates. The measures of key factors were consistent among all four event types and included the following:

- Ensure that meeting venue is an IACC (International Association of Conference Centers) certified property.
- Follow-up with attendee surveys
- Collect interviews and feedback
- Conduct pre/post assessments
- Gauge reaction of attendees

Some of the participants had insights regarding the evaluation questionnaires. One participant said:
A post meeting survey three-six months after the event is a great indicator to measure success of an education meeting/event. In addition, venue selection is important to any event, however it is not the best indicator of success. The content and delivery method of said content would be the best indicator of the event. (Respondent B)

Another participant said:

Attendee surveys are important for minimal improvements, where the stakeholder’s feedback helps to improve the overall content of the meeting. (Respondent F)

Another insight included:

Certainly attendee surveys are important to judging the success of an event or meeting, but you have to consider throwing out the very high and very low scores and finding an average. One unhappy person shouldn't screw all of the results! (Respondent C)

**Summary of Findings**

In this chapter, I reviewed the study’s overall purpose and research questions, but focused on the results from the qualitative portion of the study. During the six interviews with the study participants, themes emerged that can help address the three research questions. In addition to the emergent themes, this chapter referenced supporting quotes from the participants.

In the next section of the chapter, I summarize the qualitative findings for each research question in tables.
Research Question 1

*How do meeting and event professionals define success of their planned meetings and events?*

Table 4-1: *Summary of Definitions of Success*

<table>
<thead>
<tr>
<th>Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance</td>
<td>Attendance should meet pre-determined goals</td>
</tr>
<tr>
<td>Evaluations</td>
<td>Both positive and negative evaluations offer information regarding event success</td>
</tr>
<tr>
<td>Meeting pre-determined goals and objectives</td>
<td>Setting goals and objectives and sharing with all stakeholders is critical for success</td>
</tr>
<tr>
<td>Learning styles</td>
<td>Learning styles and knowledge of attendees</td>
</tr>
<tr>
<td>Effective event management</td>
<td>Utilizing resources in the planning process</td>
</tr>
</tbody>
</table>

Research Question 2a

*Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events?*

Table 4-2: *Summary of Key Factors for Educational Meetings and Events*

<table>
<thead>
<tr>
<th>Key Traits</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Venue, room set-up</td>
</tr>
<tr>
<td>Goals and objectives</td>
<td>Pre-determined, meeting needs of all stakeholders</td>
</tr>
<tr>
<td>Learning styles</td>
<td>Combination of auditory, visual, and interactive styles, working technology</td>
</tr>
<tr>
<td>Content retention</td>
<td>Information delivered in a way that is retainable</td>
</tr>
</tbody>
</table>
Research Question 2b

*Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events?*

Table 4-3: *Summary of Key Factors for Entertainment Meetings and Events*

<table>
<thead>
<tr>
<th>Key Traits</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amenities</td>
<td>Food and beverage, music, activities, entertainment (artists, DJ, bands)</td>
</tr>
<tr>
<td>Balance</td>
<td>Time shared for programs, networking, and fun</td>
</tr>
<tr>
<td>Excitement</td>
<td>Attendee build-up</td>
</tr>
</tbody>
</table>

Research Question 2c

*Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events?*

- Escape- Going outside norms and boundaries, location selection, activity selection

Research Question 2d

*Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events?*

- Details- Close observation to details
Research Question 3

*If key factors are identified, how are they tracked and measured by meeting professionals?*

Table 4-4: *Summary of Tracking Measures*

<table>
<thead>
<tr>
<th>Meeting Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>Certified properties and venues, attendee surveys, interviews, and feedback, pre/post assessments</td>
</tr>
<tr>
<td>Entertainment</td>
<td>Certified properties and venues, attendee surveys, interviews, and feedback, pre/post assessments</td>
</tr>
<tr>
<td>Escapist</td>
<td>Certified properties and venues, attendee surveys, interviews, and feedback, pre/post assessments</td>
</tr>
<tr>
<td>Esthetic</td>
<td>Certified properties and venues, attendee surveys, interviews, and feedback, pre/post assessments</td>
</tr>
</tbody>
</table>
Chapter 5

The Quantitative Study- Methodology

To explore the two purposes for the current research study, data collection and analysis was divided into two tiers. The first study tier utilized a qualitative research design by employing participant interviews in grounded theory methodology. The emergent themes resulting from the first tier of the study were used to inform questionnaire development for the second tier of this study. In this chapter, the methodology for the quantitative study is discussed. This chapter contains three main sections: (a) methodology (survey instrument), (b) data collection (population and sample), and (c) data analysis (statistical analysis and triangulation).

Methodology

As suggested by McGrath (1982), “multiple approaches are required. Multiple methods not only serve the purposes of replication and convergence; they serve the further, crucial purpose of compensating for inherent limitations that any one method, strategy, or design would have if used alone” (p. 101).

Survey Instrument

After analyzing the data collected from the interviews in the first tier of the study, I used the themes that emerged to inform a questionnaire with six sections. The instrument was a self-administered questionnaire, available through a web link to a Qualtrics website. The statements on the questionnaire were a combination of open-ended questions and statements where meeting
professionals were asked to circle their level of agreement, where a response of “1” indicated “strongly disagree” and a “5” response indicated “strongly agree.”

The first section contained seven statements that were designed to gauge agreement with the definition of meeting and event success, as put forth by the interview participants. I have included the theme from part one of the study that informed the question in parenthesis. The themes did not appear in the actual questionnaire. The statements were as follows:

1. A successful meeting/event is one that meets or exceeds the pre-determined goals and objectives (Definitions of Success-meeting pre-determined goals and objectives).
2. A successful meeting/event meets the needs of all stakeholders (Definitions of Success-learning styles).
3. A marker of a successful meeting/event is high attendance (Definitions of Success-attendance).
4. Positive evaluations are the best indication of a successful meeting/event (Definitions of Success-evaluations).
5. A successful meeting/event professional can transform stated goals and objectives into the desired result (Definitions of Success-meeting pre-determined goals and objectives).
6. Appropriate management of resources is a marker of a successful meeting/event professional (Definitions of Success-effective event management).
7. Please feel free to add insights or comments about statements 1-6.

The next section’s eight statements targeted responses about success metrics specific to educational meetings and events. The statements were as follows:

8. An educational meeting/event is one where content retention is critical (Educational key traits- content retention).
9. Annual conferences, professional development workshops, and seminars are examples of educational meetings/events *(Educational key traits-definition)*.

10. The main purpose of an educational meeting/event is to impart knowledge to the attendees *(Educational key traits-goals and objectives)*.

11. An auditory learning style is the best delivery method for a successful education meeting/event *(Educational key traits-learning styles)*.

12. A visual learning style is the best delivery method for a successful education meeting/event *(Educational key traits-learning styles)*.

13. An interactive, highly participatory learning style is the best delivery method for a successful education meeting/event *(Educational key traits-learning styles)*.

14. Venue selection is the best indicator of a successful education meeting/event *(Educational key traits-location)*.

15. The best method to measure success of an education meeting/event is through an attendee survey *(Summary of tracking measures)*.

16. Please feel free to add insights or comments about statements 8-15.

The third section of the questionnaire looked to collect information specific to success metrics on entertainment events. The statements were as follows:

17. Having fun is the primary goal of an entertainment meeting/event *(Entertainment key traits-definition)*.

18. An entertainment meeting/event is connected to a marketing or branding message *(Entertainment key traits-definition)*.

19. Entertainment meetings/events are used for incentives or to reward attendees *(Entertainment key traits-definition)*.
20. Examples of entertainment meeting/events include receptions and dances

(Entertainment key traits-definition).

21. Good food and beverage is the best indicator of a successful entertainment
meeting/event (Entertainment key traits-amenities).

22. A balance of program time versus networking time is the best indicator of a
successful entertainment meeting/event (Entertainment key traits-balance).

23. Success for an entertainment meeting/event can be measured by attendee level of
excitement (Entertainment key traits-excitement).

24. Please feel free to add insights or comments about statements 17-23.

The fourth section contained two statements that focused on gleaning success metrics for
escapist meetings.

25. “Getting away from it all” defines an escapist meeting/event (Escapist key traits-
definition).

26. Rewards or incentive travel qualifies as an escapist meeting/event (Escapist key
traits-definition).

The fifth section offered two statements about Pine and Gilmore’s “esthetic” experience
quadrant, as well as an open-ended question on measurement.

27. Successful meetings are esthetically pleasing (Esthetic key traits-definition).

28. Esthetic meetings engage all senses of the attendee (i.e. sight, sound, taste)

(Esthetic key traits-definition).

29. Please feel free to add insights or comments about statements 25-28.

30. How are the key tangible, intangible, and/or non-financial traits for meetings and
events tracked and measured?
The sixth and final section of the questionnaire looked to collect socioeconomic information on the respondents, by asking questions on gender, title, employing agency, duration of employment in the meeting/event industry, and industry certification.

Data Collection

The second tier of this study employed a questionnaire for the purposes of data triangulation and generalizability.

Population

My local chapter of Meeting Professionals International comprised the population for the questionnaire. The Middle Pennsylvania chapter of Meeting Professionals International is located in Harrisburg, PA and has 108 members (Meeting Professional International, 2013). I selected this group based on my constraints of time and money, as well as the chapter’s proximity to my location. If the survey link or website failed, I could have attended a local chapter meeting with paper copies of the questionnaires.

Sample

When I was granted access to the population by chapter leadership, I sampled the membership using random sampling. For generalizable results using a questionnaire technique, 80 participants would need to be recruited (Krueger, 2001, p. 250) from the population of 108. The sample number of 80 participants was determined by using a 95% confidence interval.
Therefore, I had chapter leadership invite participants that were currently employed as a meeting professional. The link to the questionnaire was provided in an e-mail, as found in Appendix D.

In retrospect, there was no need to randomly sample the population of 108 members. I should have sent the survey link to the entire chapter, and disregarded results from respondents that did not meet the criteria. Additional responses would have strengthened the results.

In keeping with my promise of confidentiality from the first phase of this study, I did not collect names or other identification markers of the participants. The following information was voluntarily collected from the 54 participants who completed the questionnaire:

- 81% of the participants were female and 19% were male.
- Participants identified themselves as planners (56%), suppliers (8%), and “other” (36%). The other category included job titles such as security, student, and manager.
- Associations employed 15% of the participants, with Corporations employing 19%, Independent Planners as 17%, and 50% described as “other”.
- The length of employment in the meetings and events industry varied among the participants. 41% were employed less than 5 years, 15% between 5 and 10 years, and 43% were employed over 10 years.
- Thirty-seven percent of the participants held an industry certification, including the Certified Meeting Professional and the Certified Meetings Manager, while sixty-three percent reported having no industry certification.

The demographic information was important for me to review. First, the gender mix of the first tier of the study (75% female, 25% male) was similar to the mix of respondents from the second tier. This showed consistency in participants between the two phases of the study. The employment information was also important to review, as it showed a diversity in the population. The industry certification percentage was higher in the first tier of the study (63% held a
certification). I was happy to see a different percentage represented in the sample for the questionnaire. I had a concern that the industry certified participants would use jargon, or respond in a way that they were taught for their certification exam, as opposed to how things really are. Having less certifications in the second tier allowed me to see if there was level of agreement, without specific industry education.

Data Analysis

Statistical Analysis

The goal of the questionnaire was for meeting professionals to determine levels of agreement with 25 Likert Scale questions regarding success metrics for meeting planning. For the scale, a response of “1” indicated strongly disagree, and a response of “5” indicated strongly agree. A response of “3” indicated a neutral response. To analyze the categorical questionnaire data, I used Minitab software to conduct a Pearson’s chi-squared test.

Test for Uniform Distribution. The first step of the chi-square analysis was to perform a test of uniform distribution. This test is completed to see if the meeting professional respondents are selecting questionnaire responses at random. For five response choices, if the answers were selected at random, I would expect to see a uniform distribution of 0.2 for each option (null hypothesis). If this not the case and the meeting professionals were showing preference with their choices, we could reject the null hypothesis.

To conduct the test for uniform distribution, the response data was entered into Minitab. A Goodness of Fit test (one variable) with equal proportions was used to analyze questions that had five responses (questions 3, 12, 14, 15, 17, 18, 19, 21, 25, and 27).
The Goodness of Fit test (one variable) with equal proportions works well with questions that have all five answers. However, that test is not particularly strong, when less than five responses are selected. In the case for the remainder of the survey questions (questions 1, 2, 4, 5, 6, 8, 9, 10, 11, 13, 20, 22, 23, 26, and 28), I altered the Goodness of Fit test (one variable) to analyze the observed counts, rather than categorical data.

**Test for Preferences.** After the Test for Uniform Distribution was conducted, I tested the data for preference. The analysis is a chi-square test for a binomial distribution, which analyzes two groups of data. The first step in this test is to recode the five response categories into two. I selected to group answers “4” and “5” into one category (entered into Minitab as “1”), to indicate agreement, and grouped answers “1”, “2”, and “3” into the second category (entered in to Minitab as “0”), to indicate non-agreement. Since category 1 contained two answer components, the proportion assigned was 0.4; category 0 contained three answer components and was assigned a 0.6 proportion.

For each of the 25 questions, a chi-square goodness of fit test with specific proportions was conducted. This test determined if the meeting professionals displayed a preference for agreement in their answers. To conclude if the preference was agreement or disagreement, Minitab’s Chart of Observed and Expected Values was used.

**Additional Considerations.** Two additional components were considered in this analysis. First, for both the Uniform Distribution test and Preference test, a p-value threshold of 0.05 was used. Second, each statement was analyzed individually, rather than treating the data set as a family. It was important for me to identify the levels of agreement for each question, rather than report levels of agreement for the data set as a whole.
**Triangulation**

Jick (1979) describes the basic assumption of triangulation is to help discover the truth, assuming that there is one truth. Triangulation compensates for weaknesses in single methods by counter-balancing with the strengths of another method (1979). In addition to test the degree of external validity (Yin, 2005), triangulation helps achieve a more “holistic interpretation” of a phenomena, while prompting a closer inspection of possible discrepancies in the findings. While Jick uses triangulation because there is an assumed one true reality, Cox and Hassard (2005) take issue for this reason, as they state that reality is depicted through multiple methods and measurements (2005).

For this study, I employed the between (or across) method of triangulation. Jick (1979) explains that cross validation is present when two or more distinct methods are found to be congruent and yield comparable results. In this case of this study, the findings from the grounded theory portion were tested with a questionnaire. The results are discussed in chapter six of this document.

**Chapter Summary**

This chapter detailed the quantitative methodology used to triangulate the data collected in the qualitative portion of the study. A questionnaire was distributed to a random sample of 80 meeting professionals from the population of the Middle Pennsylvania Chapter of Meeting Professionals International. Appendix D provides the recruitment letter and questionnaire statements and Appendix E provides the responses to the open-ended questions on the survey instrument.
Chapter 6

The Quantitative Study - Results

I present the results of the second tier of this study, the quantitative study, in three sections. In the first section, I review the study’s purpose, research questions, research method, and data analysis. In the second section, I provide the findings for each of the chi-square tests, and the third section summarizes the findings for each research question.

Review of the Study

This study’s primary purpose is to have meeting professionals discuss and define success in the events that they plan, based on their documented experiences, and identify key (and potentially non-financial) planning factors that help create success.

Secondarily, this study looks to identify a connection between event type and evaluation metrics to determine if appropriate success metrics vary per meeting/ event type. Based on my personal experience in the meetings and events industry and my interaction with meeting professionals, I had learned that regardless of industry segment (i.e. corporate, association, government, etc.), professionals plan similar types of events. Based on my industry interactions, commonality among meetings and events often include education, entertainment, and networking components.

The following research questions were used to address the multiple purposes of this study:

1. How do meeting and event professionals define success of their planned meetings and events?
2. Do key factors in the planning process exist that contribute to meeting/event success?
   
a. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events?

b. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events?

c. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events?

d. Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events?

3. If key factors are identified, how are they tracked and measured by meeting professionals?

   A random sample of 80 was drawn from the Middle Pennsylvania chapter of Meeting Professionals International, with 54 completing the questionnaire. The sample yielded a diverse representation of the population; with 81% of the participants female and 19% male. Participants identified themselves as planners (56%), suppliers (8%), and “other” (36%). The other category included job titles such as security, student, and manager. Associations employed 15% of the participants, with Corporations employing 19%, Independent Planners as 17%, and 50% described as “other”.

   The questionnaire’s intent was to assess the response to the themes that emerged from the qualitative tier of this study. The participants were asked to offer their level of agreement on items linked to meeting and event success and key metrics for success in educational, entertainment, escapist, and esthetic meetings/events. After the data were collected, a chi-square analysis was performed to determine the agreement preferences of the respondents.
Research Findings

Results from Chi-Square Analyses

The results from the chi-square analysis will be presented as the test for uniform distribution, the test for preference, and then by the results for Research Questions one and two. Research Question three was addressed as an open-ended question and was not analyzed using chi-square.

**Test for Uniform Distribution (equal proportions).** The test for uniform distribution (equal proportions) was used on specific statements because respondents had selected each of the five possible answers. For each statement, the p-value was less than 0.05, and so I was able to reject the notion that the respondents were answering the questions randomly.

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**Test for Uniform Distribution (observed counts).** The test for uniform distribution (observed counts) was used on the statements in which respondents did not select all five of the possible answers. For each of these statements, the p-value was less than 0.05, and so I was able to reject the notion that the respondents were answering these questions randomly.
Table 6-2: Test for Uniform Distribution (observed counts).

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**Test for Preferences.** Because the test of uniform distribution showed that the respondents were not selecting answers randomly, I then conducted a preference test. Using a chi-square analysis and the chart of observed and expected counts; I was able to determine if the respondents displayed a preference for agreement with each statement on the questionnaire. The chart showed whether the respondents agreed or disagreed with each question.
Table 6-3: Test for Preferences.

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Results for Research Question 1

The themes that emerged to address Research Question 1, *How do meeting and event professionals define success of their planned meetings and events*, included attendance, evaluations, meeting pre-determined goals and objectives, learning styles, and effective event management. Statements one through six on the questionnaire addressed these factors. Based on the results of the chi-square, the respondents showed a preference for agreement for statements
1, 2, 4, 5, and 6. Statement three, A marker of a successful meeting/event is high attendance, \(X^2(1, n=54) = 0.12, p > .05\), did not produce a significant result.

**Results for Research Question 2a**

The themes that emerged to address Research Question 2a, *Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of educational events*, were location, goals and objectives, learning styles, and content retention. Statements eight through fifteen addressed these factors. The results of the chi-square analysis show respondent agreement with statements 8, 9, 10, and 13. Statement 12 \(X^2(1, n=53) = 0.24, p > .05\), did not produce a significant result; nor did statement 15, \(X^2(1, n=51) = 0.86, p > .05\). Respondents disagreed with statement 11, *An auditory learning style is the best delivery method for a successful education meeting/event*, and statement 14, *Venue selection is the best indicator of a successful education meeting/event*. I had purposely worded the questions with the phrasing “the best” to elicit a response. However, some respondents had commented negatively about the wording. Perhaps this was a limitation of the questionnaire in which different wording would have yielding a different level of agreement.

**Results for Research Question 2b**

The themes that emerged to address Research Question 2b, *Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of entertainment events*, were amenities, balance, and excitement. Statements 17 through 23 addressed these factors. The results of the chi-square analysis show respondent agreement with statements 19, 20, 22, and 23. Statement 17 \(X^2(1, n=51) = 0.19, p > .05\), Statement 18
Results for Research Question 2c

The theme that emerged to address Research Question 2c, *Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of escapist events*, was escape. Statements 25 and 26 addressed this factor. The results of the chi-square analysis show respondent agreement with both statements regarding “getting away from it all” and incentive travel.

Results for Research Question 2d

The theme that emerged to address Research Question 2d, *Do specific tangible, intangible, and/or non-financial factors in the planning process exist that contribute to the success of esthetic events*, was details. Statements 27 and 28 addressed this factor. The results of the chi-square analysis show respondent agreement with both statements regarding esthetically pleasing meetings/events, and engagement of all the senses.

Results for Research Question 3

To address the third research question, *If key factors are identified, how are they tracked and measured by meeting professionals*, an open-ended question with this wording was included on the questionnaire. Less than one-half (n=22) addressed this question with answers similar to the interviewees from the study’s first. Responses included post-event attendee surveys, attendee
interviews, Twitter comments, pre/post assessments, and observing the reaction of attendees during the meeting/event.

**Summary of Findings**

The questionnaire yielded similar results about the answers to the research questions. Meeting and event success can be defined, in terms of this study, with evaluations, the achievement of pre-determined goals and objectives, learning styles, and effective event management. Markers for successful meetings and events are vast, and vary based on meeting/event type: particularly types as suggested by Pine and Gilmore’s Experience Economy framework. Finally, there are several agreed-on methods of measuring success, such as attendee evaluations, reactions, and feedback, as well as social media comments, and assessments.
Chapter 7

Summary, Conclusions, and Recommendations

While industry literature and trade publications describing the process for planning meetings and events, as well as providing information regarding the Return on Investment (ROI) Methodology, are plentiful, it has been identified that ROI is only an appropriate measure of success in five percent of meetings and events, currently with less than one percent usage rate (Phillips, Myhill, & McDonough, 2007, p. 2). The idea for the study discussed in this paper came to fruition from my interest in evaluation techniques for training programs, and from my experience working with meetings and events industry professionals. At various industry conferences, I have discussed with and observed industry professionals struggle with evaluation techniques and their understanding of the Phillips’ ROI Methodology. Many professionals expressed feelings of frustration with data collection and analysis when trying to use ROI.

One of the two main purposes of the current research study was to allow meeting and event professionals to discuss and define success in the events that they plan, based on their documented experiences, and identify key (potentially intangible and non-financial) factors that help create success. By encouraging industry professionals’ involvement, my hope was to collect rich data that would help to inform future studies regarding meeting and event evaluation and model creation. The secondary purpose was to determine if the meetings and events industry could be re-classified according to the Experience Economy framework, with meeting/ events types, as alleged by Pine and Gilmore (1998, 1999, 2001, 2011), focused on entertainment, education, escapism, and esthetics. By re-classifying the meeting and events industry according to Pine and Gilmore’s model, it would be possible to identify if common success metrics exist within each group. Since many classifications of the meetings and events industry exist currently,
the use of the simplistic Pine and Gilmore framework would aid industry professionals with consistent terminology use and evaluation calculation.

Chapter 1 of this paper introduced a historical perspective of the meetings and events industry, the significance of this study, a statement of the problem, and the three research questions for this study. Chapter 2 presented a review of related research surrounding the topic of meeting and event evaluation. Chapters 3 and 4 presented the first phase of this exploratory, sequential study by discussing the qualitative methodology (Chapter 3) used for data collection and analysis and the findings from the interviews (Chapter 4). Chapters 5 and 6 present the second tier of this study, with a discussion of the quantitative methodology used for data triangulation (Chapter 5) and the questionnaire findings (Chapter 6). This final chapter provides a summary, conclusions, and recommendations in five parts: (a) a study overview; (b) a summary of the findings; (c) the ties between this study and the literature; (d) recommendations for future research and meeting professionals; and (e) lessons learned.

**Study Overview**

This study comes at a critical time. As the meetings and events industry continues to grow and mature, and meetings and events become strategic solutions for clients, meeting professionals are required to show business value in the meetings and events that they plan. Clients need constant reassurance that their event will have a positive or a successful outcome. In some cases, this measure of success can be a financial one: where the meeting or event benefits outweigh the costs. However, with a wide variety of meeting and event types, it is not always possible to quantify benefits with a dollar value. Meetings and events can have intangible benefits, but with current evaluation models, these intangible benefits are not measured well and are somewhat ignored. Another gap in current meeting and event evaluation models is the focus.
Models such as the Phillips’ ROI Methodology measure return on investment for the client, but much of the data is not relevant or collectible for the meeting professional. Little information exists on how planners can measure the success of their meetings and events. The need to demonstrate business value and limited success metrics are the key reasons why this study was conducted.

From an evaluation standpoint, industry professionals are faced with two primary issues. First is the definition of a successful meeting or event and the second is how to appropriately measure intangible, non-financial success. What constitutes success may vary by industry segments or meeting type, but these nuances aren’t addressed in current evaluation models, such as ROI. ROI is only an appropriate measure in 5 percent of meetings and events (Myhill & Phillips, 2006). This suggests that additional success metrics can be developed and tested, and perhaps debunk the “one size fits all” nature of the ROI model.

A two-tiered study employing qualitative and quantitative methodologies was used to address the research questions. Six participants, all part of executive leadership from member organizations of the Convention Industry Council (CIC) were interviewed via telephone with the objective of identifying how meeting and event industry professional define and discuss success in the events they plan.

The interviews were also designed to uncover key success traits along with ways to measure them, as well as determine if the Pine and Gilmore Experience Economy framework is an appropriate industry classification. The interview questions also had the participants discuss meetings and events from the perspective of the conceptual framework of Pine and Gilmore’s four experience realms, in order to determine if a new classification of the meetings and events industry was appropriate.
Summary of Findings

This section presents an overview of the results for each of the research questions. In Chapter Four, direct quotes from the participants were used, but this discussion is the researcher’s summary of the findings.

Summary of findings related to Research Question 1

*How do meeting and event professionals define success of their planned meetings and events?*

The professional participants in this study believe that evaluation, obtaining pre-determined goals and objectives, learning style, and effective event management, are indicators of meeting and event success. Attendance was identified as a theme for success during the interview phase of this study, but the second study tier produced results regarding that were not statistically significant.

Summary of findings related to Research Question 2

*Do key factors in the planning process exist that contribute to meeting/ event success?*

This study revealed that different event types have different evaluation needs. The participants identified key traits that contribute to the success of educational and entertainment, meetings. Educational and entertainment meeting success were the most robust, as all the participants had experience in planning, attending, and critiquing these event types. Success traits in educational meetings include location, goals and objectives, learning styles, and content retention. Entertainment success is indicated by amenities, balance and excitement.
Escapist and Esthetic events were more difficult for the participants to discuss, as these were a new way of classifying meetings and events. The participants were able to identify the concept of “escape” or “getting away from it all” as a success metric, whether the event is held in an exotic location or not. The participants also agreed that all successful meetings and events have some aesthetically-pleasing elements to them. However, these two concepts were not as good a fit for meetings/events as the realms of education and entertainment.

**Summary of findings related to Research Question 3**

*If key factors are identified, how are they tracked and measured by meeting professionals?*

The tried and true measures to evaluate meetings and events were identified in this study. The participants believed the success could be measured, for any event type, through the use of attendee surveys, interviews, feedback, and observation of attendee reaction. Comments regarding the use of social media, specifically Twitter, were introduced as part of the questionnaire in the second tier of the study.

**Tying Conclusions to Key Research**

As discussed in Chapter Two, current evaluation research addresses some of the meeting and event evaluation issues found in this study. However, this study revealed some factors not found in the research. This section discusses what study findings have been supported by the key literature and what new contributions are made by the study to help understand meeting and event success.
Support from previous research studies

The results suggest that pre-determined goals and objectives are required to contribute to a successful outcome. In the Phillips’ ROI model, the creators Philips, Myhill, and McDonough (2007) stated that “meetings and events are sometimes ineffective because of undefined needs. Another problem stems from a misalignment between the meeting and specific business needs” (p.13).

The second study finding supported by current research is the identification of ROI as a success metric. This intent of this study was not to discredit the ROI methodology, but rather to seek potential alternatives to the use of this technique in the meetings and events industry. Pulliam-Phillips and Phillips (2005) suggest that the ROI method is only applied to 5 percent of programs. Only the most important, expensive, or strategic programs need to be assessed at this level of financial accountability. This aligns with the study findings, as only one participant in both study tiers identified ROI as a success metric.

Contributions to research

The results of this study provide insights into a variety of success metrics that vary per event type. The use of Pine and Gilmore’s Experience Economy framework proved to be a good match for meeting and event types. Meeting professionals could readily identify with educational and entertainment events. While the terminology of escapist and esthetic events was not familiar to most professionals, the participants responded with interest in this new classification.

Educational experiences, as discussed by Pine and Gilmore (1999) allow the attendee to absorb the events as they unfold, but these experiences require the active participation of the attendee. Pine and Gilmore state, “to truly inform a person and increase his knowledge and/or
skills, educational events must actively engage the mind (for intellectual education) and/or the body (for physical training)” (p. 32). This comment aligns with the study participants’ identification of a combination of auditory, visual, and interactive learning styles as an indicator of success.

Entertainment experiences are passively absorbed through the senses (Pine & Gilmore, 1999) such as viewing a performance, listening to music, or reading. The study participants identified amenities such as music and food and beverage and key traits of successful entertainment events.

Pine and Gilmore (1999) describe the escapist realm as one where the attendee would actively participate in an immerse environment. The study participants, while not used to classifying meetings and events with this term, also identified the key trait of “escape” or immersion. It was not necessary to hold an event in an exotic locale, the study participants explained. It was just necessary to “get away from it all”.

The fourth realm of Pine and Gilmore’s model is the esthetic, defined as experiences where “individuals immerse themselves in an event or environment, by they themselves have little or no effect on it” (p. 35). Esthetics are important to meeting and event success, as determined by the study participants. They discussed attention to detail as a key trait in esthetic meetings. This equates to attendees being immersed in an event; where they do not see the “behind the scene” or issues and problems are not obvious.

As recommended by Creswell (1998), in the grounded theory approach, a visual matrix should be created to display the conditions influencing the phenomenon of meeting and event success. Figure 7.1 shows my depiction of the key traits that influence meeting and event success, within the framework of Pine and Gilmore’s Experience Economy.
Recommendations for future research and for meeting professionals.

The study discussed in this paper explored the definitions of meeting and event success, and identified key success traits used to measure them. Based on the study findings, the following are recommendations for future research and for meeting professionals.

Recommendations for future research

The study identified success metrics for educational and entertainment meetings and events, as these two category names are familiar and popular among meeting and event professionals. However, there are several areas of opportunity for future research.
1. While all the interviewees that participated in the first tier of this study suggested that achieving pre-determining goals and objectives is the key component in a definition of success in meeting and events, it would be beneficial to determine the following two concepts. First, how many meeting and event professionals are setting pre-determined goals and objectives at the start of the planning process, and second, are the goals and objectives used specific, measurable, and time-sensitive?

2. Explore the themes that emerged for success traits for educational and entertainment events. While this study reached data saturation among experienced meeting and event professionals (over 10 years of industry experience), additional themes may emerge from less-experienced professionals who possibly have more formalized education in the meetings and events industry.

3. Continue to study the concepts of escapist and esthetic events. As the current literature suggests, many components of the meetings and events industry are well understood, perhaps with the exception of incentives. Incentive tourism is usually undertaken as a type of employee reward by a company or institution for targets met or exceeded, or a job well done. Unlike the other types of MICE tourism, incentive tourism is usually conducted purely for entertainment, rather than professional or educational purposes (Society of Incentive & Travel Executives, 2013).

4. Future research may continue to build on the existing evaluation models of Kirkpatrick and Phillips. The information found in this study can serve as a
starting point to develop a new meetings and events evaluation model, or to refine the existing ones. An evaluation model should also focus on specific measurement tools. In this study, the participants agreed that surveys are a great source of information on determining meeting and event success. However, the low response rates and difficulty with data analysis may indicate a better way to collect and analyze evaluation data exists, perhaps through social media channels.

**Recommendations for meeting professionals**

The most important recommendation for meeting professionals as a result of this study centers on the identification of goals and objectives. As this study indicates, all stakeholders must be informed of meeting/event objectives in advance of the meeting. This will allow for a greater chance of success, when all stakeholders can work together and share the same vision for the meeting/event.

**Lessons Learned**

This section discusses personal insights and lessons learned that may provide guidance for future researchers.

The first lesson I learned was during the interview portion of this study. I learned the importance of active listening, and identifying small details that may only be mentioned once. Several times throughout the interview process a participant mentioned an issue that no one else had brought up, like networking, branding, or the use of social media and Twitter. Opposing
opinions or small details can add richness to the findings, or may lead to a new study with a new purpose and new research questions.

My second lesson learned had to do with the methodology selection. According to Edmondson and McManus (2007), the research questions inform the methodology, and in the case of this study, a qualitative approach was appropriate to answer the research questions. Don’t be afraid to try a new methodology. Even though I have been a member of the meeting professional population for over 10 years, I learned much from the interview responses of the participants.

My final lesson learned had to do with the interview process. As a new researcher, I was very concerned about consistency and technique. Had I allowed myself some flexibility, such as asking the participants to explain an item further, or asking an impromptu question with a less structured interview protocol, I may have uncovered even more data to define meeting and event success. However, this exploratory study has allowed me to consider several ideas for future research projects, as discussed above.

Summary

Interest in ROI and meeting and event evaluation ebbs and flows with the economy. In times of prosperity, meeting professionals have more latitude with the events they plan, in terms of amount of events, location, and budget. However, in times of economic strife and cutbacks, meeting professionals must prove their value on a regular basis. It is important to streamline meeting and event evaluation to a user-friendly, consistent model. The supporters of ROI rally with their battle cry of “ROI is not going away.” And it shouldn’t. But for the 95% of meetings/events that are not appropriately measured by ROI, other forms of evaluation of success measurement are needed. This study has begun to look into meeting and event evaluation and
identify key traits that are shared between various event types. Since this study was informed by subject matter experts, meeting professionals who are currently engaged in evaluation, the results from this study may be more readily accepted throughout the industry that other evaluation models.

This study investigated meeting and event success from the views of a meeting professional. By interviewing industry experts and corroborating the findings with a questionnaire, meeting professionals used this study to start a new conversation in success definition. This study is an important step to developing additional evaluation models to help meeting professionals define their worth in all event types and in all economies- not just when desperate financial times call for proof of success.
REFERENCES


Appendix A

Interview Protocol

Recruitment message

Hello! My name is Lesley Scamacca, CMP. I am a PhD student at The Pennsylvania State University. I would appreciate your assistance with my dissertation research project on Determining Non-Financial Success Metrics for Meeting and Event Planners. I am requesting assistance from staff executives from each of the 31 member organizations of the Convention Industry Council.

The purpose of this research study is to explore potential success metrics for meeting professionals using Pine and Gilmore’s “Experience Economy” quadrants of education, entertainment, escapism, and esthetics to classify meetings and events. This research will help define meeting professional success and explore potential metrics beyond Return on Investment (ROI).

All you need to do is provide about an hour of your time, and allow me to interview you via telephone. If you do not wish to participate, simply discard this e-mail. Responses will be completely anonymous; your name will not appear anywhere in the study report. Contacting me via e-mail and setting up an interview time constitutes your consent to participate.

Please see attached Implied Consent form for additional information. If you have any questions regarding the research, contact Lesley Scamacca, department of Learning and Performance Systems, 814.404.3566 or Dr. David L. Passmore, advisor, 814.863.2583.

Thank you again for your help. Please feel free to share this survey with other members of your organization’s executive committee.

Lesley Scamacca, CMP
Implied Informed Consent Form for Social Science Research
The Pennsylvania State University

Title of Project: ID# 42852 "Determining Non-Financial Success Metrics for Meeting and Event Planners"

Principal Investigator: Lesley Scamacca, PhD Student
305D Keller Building
University Park, PA 16802
(814) 404-3566; lgh101@psu.edu

Advisor: Dr. David L. Passmore
305D Keller Building
University Park, PA 16802
(814) 863-2583; dlp@psu.edu

Purpose of the Study: The purpose of this research study is to explore potential success metrics for meeting professionals, using Pine and Gilmore’s “Experience Economy” quadrants of education, entertainment, escapism, and esthetics to classify meetings and events.

Procedures to be followed: You will be asked to answer approximately 26 questions in an interview.

Duration: It will take about one hour to complete the interview.

Statement of Confidentiality: Your participation in this research is confidential. The interviewer does not ask for any information that would identify who the responses belong to. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared because your name is in no way linked to your responses.

Right to Ask Questions: Please contact Lesley Scamacca at (814) 404-3566 with questions or concerns about this study.

Voluntary Participation: Your decision to be in this research is voluntary. You can stop at any time. You do not have to answer any questions you do not want to answer.

You must be 18 years of age or older to take part in this research study. Completion and return of the survey implies that you have read the information in this form and consent to take part in the research. Please keep this form for your records or future reference.
Meeting and Event Success

- How do you define a successful meeting/event?
- How do you define a successful meeting/event professional?

Educational Meetings and Events

- From your knowledge and experience, please define an educational meeting/event.
- Have you planned an educational meeting/event?
- What types of educational events have you planned or attended?
- What are the key traits and elements in the planning process that contribute to educational meeting/event success?
- How are these key traits and elements currently identified, tracked, and measured?

Entertainment Meetings and Events

- From your knowledge and experience, please define an entertainment meeting/event.
- Have you planned an entertainment meeting/event?
- What types of entertainment events have you planned or attended?
- What are the key traits and elements in the planning process that contribute to entertainment meeting/event success?
- How are these key traits and elements currently identified, tracked, and measured?

Escapist Meetings and Events

- From your knowledge and experience, please define an escapist meeting/event.
- Have you planned an escapist meeting/event?
- What types of escapist events have you planned or attended?
- What are the key traits and elements in the planning process that contribute to escapist meeting/event success?
- How are these key traits and elements currently identified, tracked, and measured?
Esthetic Meetings and Events

• From your knowledge and experience, please define an esthetic meeting/event.

• Have you planned an esthetic meeting/event?

• What types of esthetic events have you planned or attended?

• What are the key traits and elements in the planning process that contribute to esthetic meeting/event success?

• How are these key traits and elements currently identified, tracked, and measured?

Meeting Professional Socioeconomic Characteristics

What is your gender?

• Male
• Female

What type of organization are you presently employed by?

• Association
• Corporation
• Travel Agent
• Independent Planner
• Government
• Other

How long have you been a Meeting Professional?

• Under 5 years
• Between 5-10 years
• More than 10 years

Are you a Certified Meeting Professional?

• Yes
• No
Appendix B

Member Organizations of the Convention Industry Council

1. AMC Institute
2. American Hotel & Lodging Association (AH&LA)
3. ASAE & The Center for Association Leadership (ASAE & The Center)
4. Association of Collegiate Conference and Events Directors-International (ACCED-I)
5. Association of Destination Management Executives International (ADME International)
6. Destination Marketing Association International (DMAI)
7. Convention Sales Professionals International (CSPI)
8. Event Service Professionals Association (ESPA)
9. Green Meetings Industry Council (GMIC)
10. Hospitality Sales & Marketing Association International (HSMAI)
11. International Association of Conference Centers (IACC)
12. International Association of Professional Congress Organisers (IAPCO)
13. International Association of Speakers Bureaus (IASB)
15. International Special Events Society (ISES)
16. Meeting Professionals International (MPI)
17. National Association for Catering and Events (NACE)
18. National Speakers Association (NSA)
19. Professional Convention Management Association (PCMA)

21. Religious Conference Management Association (RCMA)

22. Society of Government Meeting Professionals (SGMP)

23. Site

24. Southern African Association of the Conference Industry (SAACI)

25. U.S. Travel Association (U.S. Travel)

The following organizations did not have contact information listed for their executive board, so were not sent a recruitment message:

26. Exhibition Services & Contractors Association (ESCA)

27. Financial and Insurance Conference Planners (FICP)

28. Healthcare Convention & Exhibitors Association (HCEA)

29. International Association of Exhibitions & Events (IAEE)

30. International Association of Venue Managers (IAVM)

31. National Coalition of Black Meeting Planners (NCBMP)
Appendix C

Open Coding and Transcript Sample

Open coding sample from the researcher
(R= the researcher, Respondent PS = Participant from pilot study)

R: How do you define a successful meeting or event?

PS: A successful meeting or event is really hard to define, but I know it when I see it.

Difficult to define
Planner experience

Adhere to planning process
Or not
Good experience for attendees

Note: Best way? (Implying one way to define success?)

End result meets everyone’s expectations

Meets objectives

Everyone: Planner, supplier, boss, attendee

R: Who is everybody?

PS: The attendee, my boss, so I guess the planner. The suppliers, too.
### Open coding sample from the second coder
(R= the researcher, Respondent X = Participant from pilot study)

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard to define</td>
<td>Knows when it is seen - experience in field, or experience with success</td>
<td>R: How do you define a successful meeting or event? PS: A successful meeting or event is really hard to define, but I know it when I see it.</td>
</tr>
<tr>
<td>Going the way things are planned</td>
<td></td>
<td>I want to say* success is when the meeting or event goes the way I planned, but that’s not always true, either.</td>
</tr>
<tr>
<td>Perceived failure</td>
<td>Attendees don’t know anything is wrong</td>
<td>Sometimes, things go way off course, but as long as the attendees don’t know anything is wrong, it’s still a success, you know?</td>
</tr>
<tr>
<td>End result (not planning?) meets expectations</td>
<td></td>
<td>But, on that note, I guess the best way to describe overall* success, is when the end result, the event, meets everybody’s expectations, and their objectives.</td>
</tr>
<tr>
<td>Objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parties involved-attendee, my boss, planner, suppliers</td>
<td></td>
<td>R: Who is everybody? PS: The attendee, my boss, so I guess the planner. The suppliers, too.</td>
</tr>
</tbody>
</table>

Note: “I want to say”- nervous about being right? Note: “Overall”- are there subtexts to success?
Appendix D

Questionnaire

Recruitment message

Hello! My name is Lesley Scamacca, CMP. I am a PhD student at The Pennsylvania State University. I would appreciate your assistance with my dissertation research project on Determining Non-Financial Success Metrics for Meeting and Event Planners. I am requesting assistance and expertise from meeting professionals.

The purpose of this research study is to explore potential success metrics for meeting professionals using Pine and Gilmore’s “Experience Economy” quadrants of education, entertainment, escapism, and esthetics to classify meetings and events. This research will help define meeting professional success and explore potential metrics beyond Return on Investment (ROI). All you need to do is complete this short questionnaire, which should take approximately 15 minutes. If you do not wish to participate, simply discard the questionnaire. Responses will be completely anonymous; your name will not appear anywhere on the survey. Completing and returning the questionnaire constitutes your consent to participate.

Please access the survey by cutting and pasting this address in your web browser: https://pennstate.qualtrics.com/SE/?SID=SV_a97T56RRjfYeUv3

If you have any questions regarding the research, contact Lesley Scamacca, department of Learning and Performance Systems, 814.404.3566 or Dr. David L. Passmore, advisor, 814.863.2583.

Thank you again for your help. Please feel free to share this survey with other meeting and event professionals.

Lesley Scamacca, CMP
Implied Informed Consent Form for Social Science Research
The Pennsylvania State University

Title of Project: ID# 42852 "Determining Non-Financial Success Metrics for Meeting and Event Planners"

Principal Investigator: Lesley Scamacca, PhD Student  
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Advisor: Dr. David L. Passmore  
305D Keller Building  
University Park, PA 16802  
(814) 863-2583; dlp@psu.edu

Purpose of the Study: The purpose of this research study is to explore potential success metrics for meeting professionals, using Pine and Gilmore’s “Experience Economy” quadrants of education, entertainment, escapism, and esthetics to classify meetings and events.

Procedures to be followed: You will be asked to answer 34 questions on a survey.

Duration: It will take between 15-20 minutes to complete the survey.

Statement of Confidentiality: Your participation in this research is confidential. The survey does not ask for any information that would identify who the responses belong to. In the event of any publication or presentation resulting from the research, no personally identifiable information will be shared because your name is in no way linked to your responses.

Right to Ask Questions: Please contact Lesley Scamacca at (814) 404-3566 with questions or concerns about this study.

Voluntary Participation: Your decision to be in this research is voluntary. You can stop at any time. You do not have to answer any questions you do not want to answer.

You must be 18 years of age or older to take part in this research study. Completion and return of the survey implies that you have read the information in this form and consent to take part in the research. Please keep this form for your records or future reference.
Please indicate your level of agreement (“1” as strongly disagree to “5” as strongly agree) for each statement.

**Meeting and Event Success**

1. A successful meeting/ event is one that meets or exceeds the pre-determined goals and objectives.
2. A successful meeting/ event meets the needs of all stakeholders.
3. A marker of a successful meeting/event is high attendance.
4. Positive evaluations are the best indication of a successful meeting/ event.
5. A successful meeting/ event professional can transform stated goals and objectives into the desired result.
6. Appropriate management of resources is a marker of a successful meeting/ event professional.
7. Please feel free to add insights or comments about statements 1-6.

**Educational Meetings and Events**

8. An educational meeting/ event is one where content retention is critical.
9. Annual conferences, professional development workshops, and seminars are examples of educational meetings/ events.
10. The main purpose of an educational meeting/ event is to impart knowledge to the attendees.
11. An auditory learning style is the best delivery method for a successful education meeting/ event.
12. A visual learning style is the best delivery method for a successful education meeting/ event.
13. An interactive, highly participatory learning style is the best delivery method for a successful education meeting/event.

14. Venue selection is the best indicator of a successful education meeting/event.

15. The best method to measure success of an education meeting/event is through an attendee survey.

16. Please feel free to add insights or comments about statements 8-15.

**Entertainment Meetings and Events**

17. Having fun is the primary goal of an entertainment meeting/event.

18. An entertainment meeting/event is connected to a marketing or branding message.

19. Entertainment meetings/events are used for incentives or to reward attendees.

20. Examples of entertainment meeting/events include receptions and dances.

21. Good food and beverage is the best indicator of a successful entertainment meeting/event.

22. A balance of program time versus networking time is the best indicator of a successful entertainment meeting/event.

23. Success for an entertainment meeting/event can be measured by attendee level of excitement.

24. Please feel free to add insights or comments about statements 17-23.

**Escapist Meetings and Events**

25. “Getting away from it all” defines an escapist meeting/event.

26. Rewards or incentive travel qualifies as an escapist meeting/event.

**Esthetic Meetings and Events**

27. Successful meetings are esthetically pleasing.

28. Esthetic meetings engage all senses of the attendee (i.e. sight, sound, taste).

29. Please feel free to add insights or comments about statements 25-28.
30. How are the key tangible, intangible, and/or non-financial traits for meetings and events tracked and measured?

**Meeting Professional Socioeconomic Characteristics**

What is your gender?

- Male
- Female

What is your title?

- Planner
- Supplier
- Other (Please specify)

What type of organization are you presently employed by?

- Association
- Convention and Visitors Bureau
- Corporation
- Government
- Independent Planner
- Travel Agent
- Other (Please specify)

How long have you been a Meeting Professional?

- Under 5 years
- Between 5-10 years
- More than 10 years

Do you hold a Meetings Industry Certification?

- No
- Yes (Please specify)

Thank you for your time and for your answers.
Appendix E

Respondents’ Comments to Questionnaire

Question 7: Please feel free to add insights or comments about statements 1-6.

• I think using the word Best in many of your questions makes this survey less effective. For example if the question below were worded differently (a helpful delivery method), I would have responded Strongly Agree, but by responding Neither Agree nor Disagree it gives you less good data to evaluate.

• These were great questions!

Question 16: Please feel free to add insights or comments about statements 8-15.

• Ditto for these questions. You using the word best made my answers less useful to the study. You were not able to gather my input, but rather I responded to poor wording of questions by saying Neither Agree nor Disagree to most. Have a list where people check off options of useful indicators would be more effective.

• Good questions

• While venue selection and attendee surveys are a method of determining success they are not the best measure/indicator.

Question 24: Please feel free to add insights or comments about statements 17-23.

• But how do you measure excitement?

• Insightful questions.

• Not sure "best" in the questions was the best choice. Maybe "good" or "sometimes."

Attendee level of excitement is only one way to measure the success of an entertainment meeting.
• I would avoid words such as "best indicator" - these may be an indicator but depending on the objectives of the event, success must be measured in different ways.

**Question 29: Please feel free to add insights or comments about statements 25-28.**

• Good questions

• I have never heard the term "escapist meeting/event" so I am not sure what you are referring to.

• Interesting way of describing a meeting.

• Escapist meetings can be close by and still provide an escape from day to day life.

• I have never heard of an "escapist" or aesthetic meeting. Is this referring to a retreat?

• Aesthetically pleasing meetings will contribute to the success of the meeting but it doesn't make a meeting successful; it all goes back to the goals and objectives of the meeting.
VITA

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Education
The Pennsylvania State University
PhD, Workforce Education and Development, 2013
Thesis: Exploring intangible and Non-Financial Success Metrics for Professionals in the Meetings and Events Industry

The Pennsylvania State University
Master of Business Administration, emphasis on Strategic Management, 2005

The Pennsylvania State University
B.S., Hotel, Restaurant, and Institutional Management, German minor, 1992

Recent Employment
The Pennsylvania State University, University Park, PA
School of Hospitality Management
Instructor and Academic Advisor, 2006-2010

Main duties:
• Prepare and facilitate four undergraduate classes per semester (approximately 250 students)
• Develop new curriculum for a Meetings/Events planning emphasis (4 course sequence)
• Advise 35 undergraduate students in course selection and graduation preparation

Courses taught:
• Hospitality Decision-Making and Information Systems (Undergraduate- HRIM 350)
• Hospitality Managerial Accounting (Undergraduate- HRIM 336)
• Advanced Food Production Service Management (Undergraduate- HRIM 430)
• Meetings and Events Part I and II (Undergraduate- HRIM 497A)
• International Culinary Experience (Undergraduate- HRIM 498I)

Memberships in Professional Organizations and Scholarly Activities
• Member of Faculty Task Force, The Professional Convention Management Association
• Member of Faculty Task Force, Meeting Professionals International
• Invited presenter for Hospitality Leadership Institute training sessions
• Contributing author for Technology Strategies in the Hospitality Industry textbook (Meetings/Events technology)
• Presenter, Seek and Explore Series, MPI World Education Congress, 2013