

1 Theoretical Perspectives of Crisis Management and Recovery for Events

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Introduction

The world is always subject to crises and many times significant developments or changes occur in the aftermath of a crisis. In this regard, any crisis can be viewed as a turning point or critical juncture, though typically characterized by ambiguity, volatility and grave worries about the future. A crisis can cause continuing existential and socio-economic impacts; however, it also provides opportunities for creativity and innovation by re-imagining and reconfiguring the strategic purpose of organizations. Crises are apposite circumstances for reflection on management approaches, decision-making and the overall stability and sustainability of any system within which individual organizations operate. Arguably, any crisis prompts change to systems and organizations analogous to its scale and extent of multifaceted impacts.

The recent COVID-19 pandemic is a case in point of a multifaceted crisis as it is not only a health emergency. It entirely disrupted the social world and its commerce bringing about serious repercussions to the everyday life of people. The event sector, being a mirror of society, has been affected dramatically. Compulsory closures and regulations regarding social distancing led to innumerable postponements or cancellations of planned events, from the Summer Olympic Games in Tokyo to the smallest of community celebrations. Professional and amateur sports alike postponed or cancelled their seasons. Businesses of all scales all along the supply chain, including the venues, entertainers, and suppliers of goods and services, suffered enormous economic losses.

It appears that the full recovery of the interdependent event, hospitality and tourism industries inevitably requires a thorough re-thinking of the current approaches to city event planning and to event tourism. The pandemic crisis showed vividly that the development of the event sector worldwide has neither been salubrious nor sustainable. This is mainly because it has been

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expanding too rapidly, without regard for the health of whole event populations or the feasibility of managing event portfolios for long-lasting resilience. In other words, growth has been unregulated and inconsiderate of its lifelong systemic consequences to the range of preexisting events. As a result, competition has been intense, to acquire the most prestigious events, to build the most attractive 'eventful cities', or to produce the most benefits from event tourism. Exorbitant costs and detrimental impacts are widely evident for mega and major events, while in many cities over-tourism and the pandemic generated debate about whether there have been too many events staged with ever-increasing investment of public money. The pandemic crisis has exacerbated this erratic state of the event sector, clearly illustrating its unsustainable growth and the need to consider events operating within broader service ecosystems.

Nevertheless, the literature lacks specific frameworks and models focused on events, determining requirements for effective crisis management and recovery, building resilience of event ecosystems and fostering their sustainable growth and prosperity. The purpose of this chapter is to contextualize the distinctive parameters and exigencies of crisis management for events and thereby set the ground for generating specific theory and evidence-based practice on this highly complex organizational landscape.

Background: Understanding the concept of crisis for events

What is a crisis? What does it entail when it comes to events? To answer these questions, first we must clarify the difference between crises and disasters. In general, crises involve a disruption that physically affects a system as a whole and threatens its basic functions and existence (Pauchant & Mitroff, 1992). Disasters are circumstances that trigger a sudden unpredictable catastrophic change over which stakeholders have little control (Scott & Laws, 2005). In the literature, the distinction is clear, relating a crisis to an internal organizational failure to act, while attributing a disaster due to an external event over which the organization has no control (Ritchie & Jiang, 2019). In addition, disasters are distinguished into natural (e.g., earthquakes, flooding, etc.) and human-made disasters (e.g., terrorist attacks, political or financial crises). However, these distinctions in the practical context of events are blurred as a crisis and a disaster may overlap; event organizers often fail to act appropriately in ominous situations of the external environment who they have no control over. For example, the COVID-19 pandemic is both a natural (virus) and human-made (socio-economic) external disaster that caused event failures and terminations. Therefore, a crisis and a disaster should be defined in particular contexts and issue areas considering their causes.

It is heuristically useful to contrast and compare the types of crisis causes for planned events. A crisis in general has either an external cause or exists in the response to an incident or general societal/economic crisis such as the pandemic. As well, smoldering or invisible crises can occur within organizations due to culture and leadership weaknesses, malfeasance or incompetence. How people and organizations respond to an incident, such as an attack or injury, or respond to a general crisis like a pandemic, is as important as the cause. For instance, witness the poor response of some governments and some events to the COVID-19 pandemic that resulted in avoidable 'super spreaders' and deaths. Table 1.1 provides a comprehensive list of possible external and internal causes of crises, followed by a list of response crises. External causes include natural, human error, human malfeasance, economic and socio-cultural conditions. Internal causes comprise organizational culture conflict, weak or incompetent management, failure to act in time or appropriately, and system-wide chaos. The causes are often interrelated, affecting one another and thus increasing the complexity of crises and the severity of impacts.

Integral to the concept of crisis is the extent of risk faced by people and organizations. O'Toole, Luke, Semmons, Brown, and Tatrai (2020) have examined the full range of risks facing events noting that catastrophes or worst-case scenarios are not part of normal risk assessment and require a different level of contingency planning. This brings to the fore another important distinction between the terms 'incident' and 'crisis'. Literature on crisis communication and risk management operates within these two interrelated terms. An incident is an unintended occurrence that disrupts normal operations, and generally incidents at events and surrounding events are minor and predictable within normal risk management.

An incident is one-off and relatively manageable, whereas a crisis can best be defined as "*a specific, unexpected, and non-routine event or series of events that create high levels of uncertainty and threaten or are perceived to threaten an organization's high-priority goals*" (Seeger, Sellnow, & Ulmur, 1998, p. 233). It is marked by a "*sense of urgency, close observation by the media and interrupts normal business operations with a potential loss of revenues and credibility*" (Williams & Treadaway, 1992, p. 57). Parsons (1996) classifies three types of crises. These are: a) an immediate crisis with little or no warning, and the organization is unable to prepare; b) a slower-in-developing, emerging crisis in which the negative impacts can possibly be stopped or minimized by organizational actions; and c) a sustained crisis with a long-term time frame.

Table 1.1: The causes of crises and disasters

EXTERNAL CAUSES

Natural (e.g., wind, hail, snow, flood, earthquake, extreme temperatures, tsunami, lightning, wildfires, infectious diseases and pandemic)

- disease and pandemic may have natural origins but their transmission is subject to human intervention;
- fire is often human caused, or attributable to malfunctions and accidents, but wild-fires may be caused by lightning;
- extreme temperatures, snow, excessive rain, wind and lightning (i.e., dangerous storms) can often be predicted by monitoring weather and weather radar;
- flooding and tsunamis are sometimes predicted, but earthquakes are often not;
- any natural cause can lead to secondary and even cascading negative impacts on the ecosystem, geology, structures, events, and whole communities, generating long-term crises such as financial losses, negative publicity, loss of goodwill and complete organizational failure;
- natural disasters may have a direct, on-site impact on events, or events might experience indirect effects such as loss of access, community disengagement or shifting priorities by governments.

Human error (e.g., injury caused by vehicular accidents and work practices; fires started by improper installation or maintenance; collapse of structures like stages; human crushes or trampling; panic without a clear cause)

- the question of legal liability may arise when human error is the cause of injury or damage to life and property, but error is also found in the responses or lack of adequate response; a basic principle of risk management is to impose waivers on attendees and participants in events, but these do not fully exempt organizations and individuals from lawsuits where negligence can be proved;
- an on-site crisis exists until immediate threats are removed and/or injuries and damages have been effectively dealt with according to emergency response procedures; however, the aftermath, including the possibility of legal action as well as damage to reputation can be prolonged.

Human malfeasance (terrorism, cybercrime, robbery, fraud, riots, fights, use of weapons, sexual assault, impaired operation of vehicles and equipment, slander)

- some types of malfeasance might remain invisible for a period of time, resulting in a delayed crisis – for example cybercrime, fraud and robbery;
- substance abuse is a special case, as it might not result in any visible or immediate problems; there is always the potential for accidents and injuries or damage to reputation to result from alcohol or drug abuse;
- on-site security is mostly taken for granted, but organizations also need a permanent system of internal crime prevention;

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- slander, or rumor mongering, can harm an organization; a permanent and live system of monitoring and response for social media is necessary;
 - a cover-up will only delay the inevitable fallout from human-caused problems; that the cause might be fixed but the crisis for the organization emerges later.
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Economic conditions (recession, unemployment, loss of credit, major economic policy shifts, changes in corporate strategy; competition)

- trends have to be monitored, but not all of these potential sources of financial problems are predictable;
 - competition is a fact of life and it applies to resources, demand, and attention; events that fail to maintain a competitive advantage are at risk;
 - the financial health and potential resilience of venues and events is always a major concern for owners and managers;
 - few organizations ever prepare for worst-case scenarios like the pandemic-imposed cancellations and (for many) complete loss of revenue – the result is numerous bankruptcies and permanent closures.
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Social and cultural conditions (de-population, demographic shifts,e.g., ageing, immigration, value shifts,e.g., towards greater sustainability or away from certain activities, cause-related protests and boycotts)

- careful attention to trends and issues can alleviate some of these potential problems, but essentially organizations have to adapt to changing conditions;
 - inclusiveness, both internally and regarding the customer bases, is one way to guard against the potential negative impacts of social and cultural shifts.
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INTERNAL CAUSES

Organizational culture conflict

- the role of founders and charismatic leaders in shaping organizational culture is potentially a source of problems; strategic planning should take into account the fact that organizations must adapt to both internal and external change;
- a crisis will occur when internal divisions threaten stability and unity of purpose;
- a crisis might arise if there is uncertainty about how to respond, or a political/ values-based impasse over the necessary/best response to incidents and problems;
- a crisis can arise from organizational misdeeds , such as ignoring pollution, cover-ups of mistakes, not adequately protecting the health and safety of customers or stakeholders, a lack of care for the resources of others (i.e., fiduciary responsibility), or false advertising; presumably there will be internal conflict over the values that encourage or permit such misdeeds, and inevitably they will result in public exposure and demands for accountability or legal action.

Weak or incompetent management

- bad decisions and inadequate management systems can lead to emergencies; financial weaknesses can make an effective response to a crisis impossible; human-resource weaknesses such as a lack of training or inadequate numbers can make it more likely that a financial problem or on-site incident will occur; technological problems can arise from both external hacking and internal mistakes;
- these are problems that should not occur in a well-managed organization, and they can be anticipated; mistakes have to be followed by corrective action;
- root-cause analysis should be completed by experts for all management failures;
- the crises attributable to bad management might be long-term and hidden from public view until they result in a major incident or complete organizational/financial failure;
- management systems can fail if they have never been tested.

Failure to act in time or appropriately:

(a) scenario 1 – there is a lack of relevant or sufficient information upon which to base decisions; scenario 2 – information is available and a correct response is known but no or inadequate action is taken (this could be a political issue such as a lack of leadership, or related to inadequate management systems)

- constant monitoring and feedback systems both internally and from external stakeholders are essential for timely responses;
- contingency plans must be in place and staff/volunteers empowered to act in a timely manner;
- even in well-managed and adequately resourced organizations, there will be a natural hesitation to cancel or postpone scheduled events; during the 2020 pandemic many events failed to prevent ‘super-spreader’ conditions.

System-wide chaos:

- in a worst-case scenario all or many social, economic, political and technological systems fail, resulting in general chaos; no organization can be expected to cope with such a large-scale disaster unless and until order and essential systems are restored;
- following the 2020 pandemic it is clear that resilience planning for tourism, hospitality, leisure, entertainment, venues and events must include the probability of many failures and specific incentives and assistance will be needed for a ‘new normal’.

As noted above, it is common that a crisis can be caused by a disaster. A commonly accepted definition in the literature portrays the concept of disaster as *“unpredictable catastrophic change that can normally only be responded to after the event, either by deploying contingency plans already in place or through reactive response”* (Laws & Prideaux, 2005, p. 6). Such disasters are often gener-

ated by technological or natural forces and can include explosions, political upheaval, riots, crime, terrorism, war (Pforr & Hosie, 2008), hurricanes, earthquakes, floods (Quarantelli, 1988) or the COVID-19 pandemic.

Hermann (1963) argues that crises present a restricted amount of time to make an appropriate and sufficient response in order to minimize the risks threatening the values, functionality and overall sustainability of an organization. The responses are critical in reducing, offsetting and containing negative impacts of a crisis occurred (Seeger et al., 1998). There are at least three general types of crisis responses, including inaction, routine responses, and novel, original responses (Billings, Milburn, & Schaalman, 1980). Inaction or routine responses are appropriate when an organization is dealing with a low-level crisis with the expectation that the problem will be solved on its own. In a time of a high-level crisis, new approaches are required to operate in unfamiliar and risky circumstances.

Turner (1976) put forward an analytical framework of crisis or disaster development. According to this framework, a collapse takes place when inaccuracy or inadequacy in the accepted norms happens. A chain of discrepant events develops and accumulates, generally unnoticed during the incubation period, and results in a precipitating event which arouses close attention and leads to the revision of the general perception. The immediate consequences of the collapse become evident, and this is followed by a rescue-and-salvage stage when those impacted recognize the critical features of the failure and develop strategies for overcoming the negative consequences. Finally, full readjustment occurs with new norms and regulations adjusted to fit new realities. It is evident that the event industry should acknowledge many unavoidable risks and consequences of crises and therefore must develop more effective coping strategies.

Health-related disasters such as the 2003 Severe Acute Respiratory Syndrome (SARS) that affected 26 countries and resulted in more than 8,000 cases, or Avian (bird) flu influenza in South East Asia in 2003-2004 severely affected tourist mobility within and to various regions. SARS resulted in a number of countries issuing warnings or restricting travel to some destinations in East Asia, while taking health safety precautions at their own borders (Hall, Timothy, & Duval, 2004). In the case of Toronto, SARS so seriously disrupted tourism, sports and events that government agencies invested heavily in a recovery event featuring the Rolling Stones (Strange, 2006). Yet, as McKercher and Hui (2004) claim, most tourists have relatively short memories and usually resume travelling when they feel the immediate threat to their health and wellbeing has passed. Several scholars such as Pforr and Hosie (2008) as well as McKercher and Hui (2004) determine that such outbreaks do not tend to have lasting impact on travel and visitor flows in the long term, and that tourism consumer confidence restores promptly.

Overall, the thesis we take in this chapter views a crisis in the context of events as an exogenous or endogenous incident unfolding in various ways by a combination of causal patterns that create complex dimensions and effects. Along these lines, we highlight that a crisis for events is:

- ◆ unexpected (unplanned) by the people and organizations affected;
- ◆ out of the immediate control of those people;
- ◆ expected to grow rapidly if not solved soon;
- ◆ increases the uncertainty of planned actions.

Crisis management through a systems perspective: Chaos and complexity theories

A complex systems perspective is useful to capture the unfolding of crises, their effects and responses of event organizers within their complex environments (Faulkner, 2001; Paraskevas, 2006; Speakman & Sharpley, 2012). Contrary to traditional linear-reductionist models of crisis management, chaos and complexity theories assume the nonlinear nature of the world, environment and observed phenomena. They provide important lines of inquiry for crisis management by viewing events as complex adaptive systems of interactions and relationships. In particular, chaos theory investigates the behavior of nonlinear systems and illuminates their state (Boukas & Ziakas, 2014), as shown by its basic principles in Table 1.2. It is associated with complexity theory but these perspectives are not identical. The focus of chaos theory is how simple systems give rise to complicated unpredictable behaviors, while complexity theory focuses on how systems consisting of many interdependent elements can lead to well-organized and nearly predictable behaviors (Olmedo & Mateos, 2015). The interconnection between chaos and complexity is known to make up a *chaordic* system: that is a complex adaptive system of dynamic connections between elements that form a unified whole, whose behavior is simultaneously unpredictable (*chaotic*) and *orderly* (Olmedo & Mateos, 2015). Events operate within chaordic systems characterized by dynamic structures, complex and nonlinear relationships between organizations, which evolve through time creating new emergent properties, and although their evolution is hardly predictable, it shows patterns of order. Any crisis causes turbulence to the already volatile environment within which events are embedded until 'self-organization' takes place as the consequence of bifurcation where order re-emerges out of a random and chaotic phase (Boukas & Ziakas, 2014).

Events themselves can be seen as complex adaptive systems. Such systems have the ability to alter and learn from past experiences. From a crisis management standpoint, we need to know how events and their stakeholders adapt to their environments and how they cope with conditions of high uncertainty.

Table 1.2: Basic principles of chaos theory

Explanation	Implications for events
Butterfly effect	
Insignificant changes in early stages of development may lead to a chain reaction which climaxes to the production of larger outcomes; these can dramatically shift the structure of the system.	The sensitive dependence of events on initial conditions and small changes which may suddenly occur influencing them catastrophically at national/international levels.
Lock-in-effect	
Inherited innovations in the past may have a lasting effect, even though changes in the conditions may have made the initial response redundant.	Mistakes of the past continue to happen by event organizers.
Edge of chaos	
A condition of extreme readiness for radical change as equilibrium is fragile and may be unexpectedly disrupted.	Events must be ready to cope with changes; extinction of unsustainable or 'unfit' events, while creating new opportunities for events capable of adapting.
Bifurcation	
The system overwhelms a critical point of the space phase and moves into a new phase.	Events enter in a new situation characterized by chaos and disequilibrium, a state where overwhelming changes exceed all current knowledge and response capabilities. It may lead to an event's break-down, resulting in its end, or break-through to one of various new states of order.
Self-organization	
New levels of form, organization and complexity often arising from interchanges between organisms and their context. A consequence of bifurcation where order re-emerges out of a random and chaotic phase.	An event becomes more suitable to deal with external or internal obstacles because of more optimized available resources. The crisis enters a resolution stage and the event enters a new normality.
Strange attractor	
The new behavior that is a departure from the previous norms that would be difficult to duplicate.	The values, codes, contradicting pressures and needs or oppositional paradoxes to which events logically and repetitively return.

Source: Boukas & Ziakas (2014).

This will inform the formulation of recovery strategies to changing conditions and contexts. By viewing events as adaptive systems, we can comprehensively examine and better understand how the individual and collective behavior of stakeholders adapts and self-organizes recovery strategies. Crisis management, thus, is an elusive balancing between chaos and order (stasis). Notions of emergence and self-organization can shed light on how social contexts become collective realities, where the 'whole' is more than the cumulative sum of its elements. Walby (2009) suggests that we need to understand the intersectionality of interacting systems upon one another making the environment in which a system operates as populated by competing, overlapping systems. Events are innately intersectional as their operations and delivery usually span across different system sectors. Viewing events as chaordic systems can reveal the emergent properties and interacting elements of events with the environment in order to make short-term decisions. This is essential for events since there can be several types of crises that make them highly susceptible to environmental changes and exogenous shocks. Therefore, we need to examine the complex adaptive interactions among event stakeholders in order to understand the complexity of environmental conditions and the contribution of each stakeholder to the recovery process of events. Quite surprisingly, however, chaos and complexity theories have not yet been applied to events to study operational and policy issues and so our event-specific chaordic knowledge is very limited about crisis management.

Nonetheless, in the academic literature and in praxis a 'systemic' turn has been made in how events are viewed and treated. This marks a progression from exclusively thinking about single events to event portfolio management in many cities and destinations (Antchak, Ziakas, & Getz, 2019). Still, there has been little if any discourse on the paradigm shift required to ensure resilience in the event sector. We can place this evolution of theory and praxis within two contexts of discourse, including neo-liberal capitalism being the source of intense competition and growth-oriented policies, and sustainability – with a considerable doubt about continued growth of the sector, a doubt now punctuated by the near collapse of international travel and tourism.

Evidently, sustainability in the event sector is much more than the greening of events and venues, and more than using a triple-bottom-line or balanced scorecard approach when evaluating outcomes. It is important to recognize that sustainability is not an end state, but a process of continuous improvement with sights set on the long-term. The continued existence and prosperity of individual events, and of managed event portfolios, especially in times of crisis, is a pertinent question. Within an organizational-ecology perspective, births and deaths are not the key point when considering population health or resilience (Andersson, Getz, & Mykletun, 2013). Instead, the core question is: how can we achieve a healthy and sustainable population or managed portfolio of events within each city and destination?

The COVID-19 pandemic crisis and the event sector

The COVID-19 pandemic crisis, with its high unpredictability and world-wide coverage, intensified uncertainty and distress about the future. For a long time, no one was able to give any reassurance of a quick and full bounce-back. The catastrophe of the COVID-19 pandemic caused a socio-political, existential and operational crisis threatening lives and businesses around the world. Responses in many places exacerbated the negative impacts because it appeared that no government or business was adequately prepared. Figure 1.1 provides a timeline outlining three stages in the pandemic and subsequent responses that pertain to the event sector.

Undoubtedly, the 2020 pandemic is proving to be much worse than SARS in 2003 or any other health-related disasters in contemporary history. It is prominent in the following ways:

- ◆ COVID-19 is the most severe pandemic since 1918; it is global and universal in extent; hardly anyone or any country was prepared for the scale of the disaster and grave impacts on health and the world economy;
- ◆ most health-related threats in the past were ephemeral (although with often lasting consequences); the 2020 pandemic took place over more than a year, including a second wave with re-infections;
- ◆ broader structural economic and social/political changes resulted, especially in the realms of leisure, tourism, events and hospitality;
- ◆ although by January 2020 most countries knew a novel coronavirus was spreading, they were not adequately prepared to prevent it, taking into account advice given over past decades about how to prepare for the next pandemic (Friedman, 2020), and deal effectively with the consequences.

The lack of timely response by the event sector to the pandemic indicates signs of organizational procrastination and structural inertia. Specifically, it is evident that there was a large and damaging gap between the time when global knowledge of the spreading pandemic was available and when national, regional and local officials took action. In most places, events were postponed or cancelled following announcement of a health emergency, while many events were held during the gap, when the public and those in charge of staging events all knew it was coming but either did not want to face the consequences with crucial decisions or lacked appropriate guidance and advice from authorities. For example, Mardi Gras in New Orleans was allowed to take place in late February 2020 without adequate warning about the risk from the federal officials. As some analysts argue, the event became a major transmission source in the area (Perlstein, 2020). In Italy, a home Champions League game between Atalanta and Valencia had been named 'Game Zero' by local media as it was held two days before the first confirmed case of locally transmitted COVID-19 (Sky News, 2020).

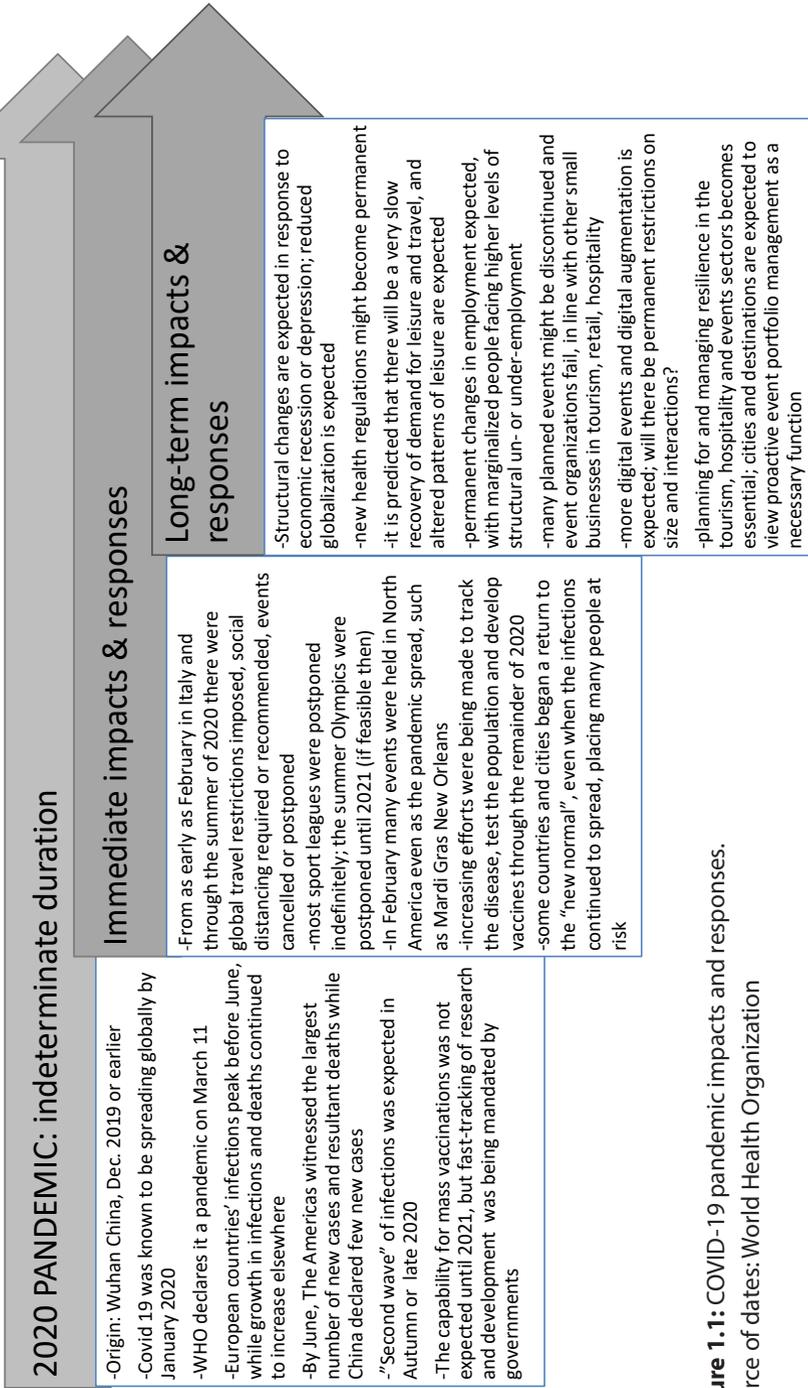


Figure 1.1: COVID-19 pandemic impacts and responses.
Source of dates: World Health Organization

Exploring trajectories of the event life cycle, Holmes and Ali-Knight (2017) identify a so-called strategy of 'hiatus', a temporary lapse with the intention to return. Usually, relevant decisions are accompanied by an announced reconvening, but that was made difficult by the uncertainties surrounding the pandemic crisis. Event cancellations and postponements require specialized management wisdom, methodical decision-making, operational adaptation and tailored strategies.

In fact, very few events have the luxury of announcing an indefinite postponement because they are restricted by the availability of venues, potential clashes with other events (some keeping to their scheduled dates, others searching for new time slots), other logistical challenges such as re-booking suppliers and entertainers, and a lack of financial resources. In 2020, many postponements of events were made with the intent or promise of holding the event at its usual time next year, but for some that proved to be unfeasible. Cancellation for one-time events means the potential experience (and its potential benefits, but not all costs) is gone forever. Planned termination of events occurs when producers and supporters believe there is no viable future after the crisis.

While postponement is apparently the most common reaction, the resulting financial and image effects are still largely unknown. The British independent festival sector, for example, has been at risk of collapsing with many events cancelled and insufficient government support measures for event companies. The UK live music event sector expected a £900m loss in 2020 (The Guardian, 2020a). Some events are venue-dependent, such as theatre. The famous Globe Theatre in London was facing bankruptcy as of May 19, 2020 (Jeffery, 2020) owing to its complete closure during the months of lockdown; a similar prospect faced the Shakespearean Theatre in Stratford, Canada, as it was forced to suspend its entire season and instead offered digital recordings of past plays, a substitute that offered no prospect of earning income (Maga, 2020).

Evidently, as of the time writing this chapter (January 2021), it is striking that no sufficient levels of contingency planning and professional expertise have yet been made available to prepare appropriately event and venue managers for the severe consequences of the 2020 pandemic. The role of industry associations becomes critical in a situation when the industry requires consolidation and clear guidance. For example, as a response to COVID-19 crisis, the UK's Association of Event Organizers (AEO) has prepared a set of key measures for small scale and more complex events to be applied in conjunction with the risk assessment. A 5P framework (Protect all, Protect contractors, Protect visitors/exhibitors/speakers, Protect event teams and Protect events) entails the key areas of event planning and staging with an emphasis on:

- ◆ Density calculation (visitor flow, crowd management, entry/exit arrangement);
 - ◆ Hygiene measures and touch-free arrangements;
 - ◆ Medical plans for identifying and managing people who may be infected/symptomatic;
 - ◆ Controlling numbers of workers on-site throughout the build and break phases;
 - ◆ Limiting equipment usage by multiple people where possible;
 - ◆ Clear communication pre-show and on-site;
 - ◆ Reviewing the profile visitor and exhibitor attendance for vulnerable groups – over 70s, asthma, etc.;
 - ◆ Minimization of numbers of people in organizer’s offices, and introduction of one-way system in and out of offices if possible;
 - ◆ Strong knowledge transfer plans;
 - ◆ Training for key personnel in managing COVID risk.
- (AEO, 2021)

This framework could become a starting point in developing more effective and sustainable solutions for the event industry in the post-COVID era; it includes critical elements of risk management that were usually neglected by the practitioners in the past.

The special case of mega and hallmark events

Mega-events like the Olympics are planned years in advance, following more years of consideration and bidding, and are difficult to postpone or cancel, given the enormous investment of resources and prestige. According to a number of commentators, the Olympics and other mega-events such as the World Cup generally do not deliver on promised economic or tourism benefits (e.g., McGillivray & Turner, 2017; Zimbalist, 2015), yet are still highly valued by some cities and countries. Hence it was controversial when Tokyo, after considerable international pressure, reluctantly agreed to move its 2020 Summer Olympic Games to 2021 (The Guardian, 2020b). This announcement came without changing the nominal date of the event, presumably in order to protect the value of its large stock of merchandise dated 2020.

A challenge also exists for those periodic events that have achieved hallmark status. These are typically festivals and sporting events (often packaged together) that have become co-branded with the city; they are valued traditions and popular tourist attractions (Getz, 2013). These events are so important in terms of tourism, economic impacts, prestige and place identity that postponing or cancelling them requires decisions at a very high level. For example, when Hurricane Katrina devastated New Orleans in 2005 there was

great controversy about whether or not to hold the next Mardi Gras (Root, 2006) and the city mayor proclaimed that the event was the 'heart of the city' and would be held as usual, although it had a reduced program. Similarly, when Calgary's Stampede, an annual rodeo, exhibition, and festival held in summer, was threatened by flood waters in 2013, the decision was made to fast-track a clean-up and repair of the site so that it could go ahead as scheduled; but in 2020 it was reluctantly cancelled for the first time in over 100 years for health reasons (Gilligan & Pearson, 2020).

As a whole, three major conclusions can be drawn from the pandemic impacts on the event sector. First, no amount of risk planning and preparation was adequate (even where it was in place) to prevent worst-case impacts that comprised the postponement and/or cancellation of numerous events, and closure of many venues around the world; this brought about deleterious effects on the entire supply chain serving tourism, hospitality, cultural and entertainment sectors. Second, there is unlikely to be a swift, complete recovery, and indeed there might be a global depression to inflict further damage. Clearly, the event sector, alongside the allied tourism and hospitality industry, has suffered considerably, and it seems that lasting damage has been done to their economic viability, resulting in a reduction of the number and diversity of events and venues. Third, a new paradigm is required to guide cities and destinations in order to overcome any type of crisis, become more resilient in adverse conditions and adapt to a new environment. To this end, attention is needed to be drawn on recovery and resilience planning of events.

Event crisis recovery and resilience planning

As with any crisis, it is not expected that all event organizations can survive the negative impacts and unfavorable new conditions. Individual events, event-producing companies, venues and suppliers need to make a range of basic strategic decisions as illustrated in Figure 1.2, applied to the context of the pandemic crisis. This straightforward decision-tree identifies first the option of not responding to a crisis with postponement or cancellation; however this carries certain risks and the impacts of the decision should be wisely assessed. Events that decided to ignore a crisis like the pandemic (or for inescapable reasons fail to act in a timely manner) might suffer from negative publicity and their future might be in doubt. If they are able to continue in the future, they will have to reconsider the options facing events that have been cancelled or postponed.

The schematic illustration provides a set of cascading decisions about events that are cancelled or postponed because of a crisis. Eventually, they might fail and have to terminate because of debt, declining corporate and public-sector support, faltering consumer demand, or logistical reasons such as an inabil-

ity to find a venue or time slot. If they choose to come back, along the way there is a need to sustain engagement with key stakeholders and this can be accomplished through social-media platforms and digital scheduled events. The last three options facing all events that try to recover are re-scheduling, reconfiguration through some form of change (redesign, reposition, rebrand), and restructuring within a network such as a managed event portfolio. This latter option relocates individual events into the core of strategic partnerships, generates new mutually beneficial synergies among stakeholders that add value to events, and ultimately reshapes the way cities and destinations plan for event resilience.

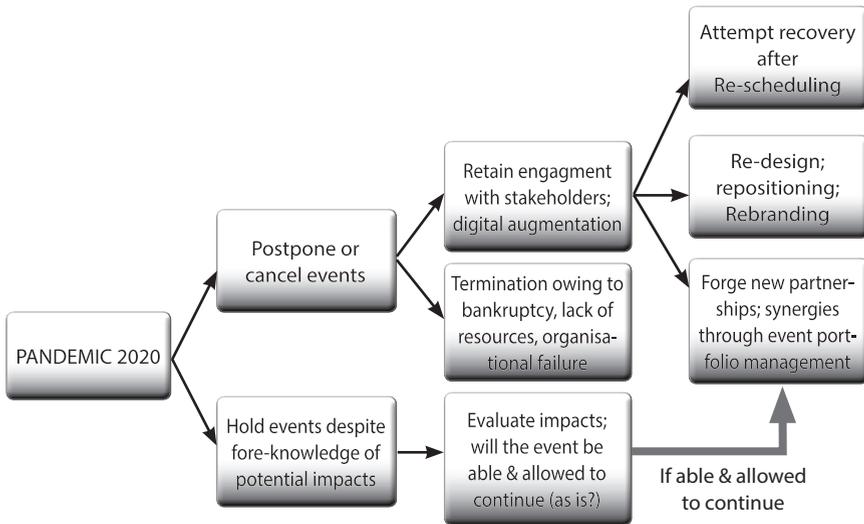


Figure 1.2: Decision-making in times of crisis

Several deviations in the decision-making of event organizers might take place necessitating a different suite of strategies. Hallmark events are a special case and their absence might lead to even greater levels of support and demand. For instance, publics who have missed the event might be asking to bring it back so that they can enjoy its qualities, and so local authorities, in turn, might quickly call for additional funding to re-instate their leading hallmark events. One-time peripatetic mega-events like the Olympics confront the following challenge, as the Tokyo 2020 shows: how can the organizers (both the governing and local organizing bodies) of a world-class event with a regular schedule adapt to postponement or outright cancellation? The investment both in hallmark and mega events is so immense, with expectations of financial returns and image enhancements, that some form of compromise is likely to happen. The same applies to popular sports that have lost part of their season or their championships.

Flexibility and adaptability are both requisite processes in the recovery phase. To adapt means to respond creatively to changes with new strategies and actions, while flexibility is required for organizations that cope with uncertainty. Several options will have to be taken into account such as deciding across a variety of venues, sponsors, dates and programming. The adaptable event organization must embrace and encourage innovation, while simultaneously be flexible in responding to both constraints and opportunities. In this context, every event, event organization as well as supporting agencies and corporations should be engaged in recovery planning. Figure 1.3 portrays the principal elements of planned event recovery that relate to any type of crisis.

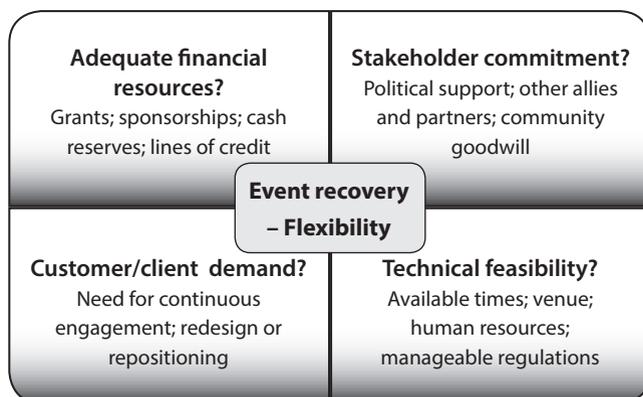


Figure 1.3: The basic elements of event recovery planning

First of all are financial resources, as lost revenues from postponed and cancelled events can lead directly to bankruptcy. Organizations with cash reserves and lines of credit have a better chance of weathering a crisis. Inability to renew or find alternative grants and corporate sponsorships are another path to failure. Much of the financial burden confronted by recovering events pertains to stakeholder commitment. As noted earlier, permanent, hallmark events are much more likely to receive commitments from local government and other supporters. Events working within inter-organizational networks and managed portfolios should be able to support each other, but that does not mean failures cannot be tolerated. Although seemingly insensitive, there is an argument to be examined and tested concerning whether the weak events should be allowed to perish and investments made only according to a new strategy.

Community goodwill must be sustained or established, as this can translate into customer demand, volunteers, and a more favorable political position. Future demand for events is never certain, as even those with loyal audiences that return year after year can be impacted by normal audience aging (raising the necessity to attract new segments) and be hit by adverse environmen-

tal conditions such as health and safety concerns or increased competition. Accordingly, a recovery plan requires unceasing engagement with all stakeholders and especially past customers or participants. A full redesign or repositioning option is possible, but risky in terms of being able to predict latent demand or the ability to capture market share.

The last fundamental element for recovery is technical feasibility or operational know-how. Rescheduling requires the ability to book a venue (e.g., even public streets and parks will have restrictions), find the same or at least a suitable time slot, recover all suppliers or get new ones, bring back volunteers and staff or recruit and train new ones, and be able to manage any new regulations, especially rules and guidelines pertaining to health and safety.

Building resilience for events

All venues and events practice risk management. The most common threats being taken into consideration are those of safety related to accidents, security related to crime and terrorism, image linked to perceived failures, and financial losses resulting from the very common inability to secure revenues to cover all costs. Health has typically been seen as a matter of meeting regulations, such as those pertaining to food, alcohol, energy, water, sanitation, evacuation and building standards – certainly not of responding to a pandemic. However, the pandemic crisis raised new health concerns and threats for public safety. Most event-producing organizations and venue managers had little or no experience with the new health demands and standards brought by the pandemic. That lack of preparedness, given the rarity of pandemics, is in itself a cause of organizational and system-wide crisis. To build resilience in the event sector, three levels of resilience planning have to be put into play: the event and its organization; the community; and the entire event population and managed event portfolio in a given area.

The event and its organization

The concept of resilience generally means the capacity to recover swiftly from difficulties or adverse conditions. There is a great amount of literature available on building a resilient organization. Such an organization is able to withstand changes in its environment and still function either without having to adjust or adapting to new conditions in a manner that better suits the new environmental conditions (McCarthy, Collard, & Johnson, 2017). Organizational resilience has been defined as:

“The ability of an organization to anticipate, prepare for, respond and adapt to incremental change and sudden disruptions in order to survive and prosper. Organizational resilience encourages businesses to look beyond risk management towards a more holistic view of business health and success. A resilient

organization should not only survive over the long term but should also flourish – passing the test of time.”

(BSI group, 2021)

Being prepared is a key requirement of proactive risk management and resilience planning. O’Toole et al. (2020, p. 157) suggest a PPRR emergency and risk management framework, including the phases of Prevention, Preparedness, Response and Recovery. *“While much of the focus will often be on the response phase, investing in prevention builds resilience, preparedness ensures scalability and capacity to manage surge and recovery operations are restorative and focus on lessons learnt to be carried forward.”* O’Toole et al. (2020, p. 26) also emphasize the notion of antifragility, citing Taleb’s (2012) definition as the ability to strengthen as a result of stress or crisis. It includes learning from mistakes, which is part of being a learning organization (Senge, 1990).

Nohria (2006) highlights the necessity for organizational adaptability as a strategic reaction on global crises. Contingency plans are necessary but not always sufficient. The most robust organizations have developed continuous sensing and response capabilities. When comparing adaptable organizations with the less robust, the following characteristics are evident:

- ◆ networked, with distributed leadership (as opposed to hierarchical and centralized);
- ◆ loosely coupled with a dispersed workforce (rather than greater interdependence among parts and a concentrated workforce);
- ◆ a cross-trained, generalist workforce guided by simple yet flexible rules, and not a bunch of specialists who are policy and procedure driven.

The matter is that a planned event might not be adaptive by its very nature: over-dependence on funding from one or a few sources; focusing on a niche market that is vulnerable to competitive pressures or economic conditions; an organizational culture that resists change, or leadership that lacks adaptive skills. All of these weaknesses can be reduced within a managed and balanced event portfolio, a strategic grouping of multiple events. It must be noted, however, that this will not prevent bankruptcies and other failures of portfolio assets.

Community resilience

Resilient communities are those that have the capacity to use available resources to respond to, withstand, and recover from adverse situations allowing for their adaptation and growth after a crisis or disaster strikes (Bosher & Chmutina, 2017; Norris et al., 2008). This level of resilience planning is critical, given the close relationships between many events, venues and residents and the direct involvement of numerous local governments and other public agencies in the event sector. Community resilience has been defined as:

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"[...] the ability of a system (like a community) to absorb disturbance and still retain basic function and structure. Building resilience means intentionally guiding the system's process of adaptation in an attempt to preserve some qualities and allow others to fade away, all while retaining the essence—or "identity"—of the system. In a human community, identity is essentially determined by what people value about where they live."

(Resilience, 2021)

This definition places emphasis on preserving identity and values. Derrett (2008, p. 107) suggests a model to show how festivals and other events can help develop community resistance, which she defined as the *"future capacity of that community to meet challenges that might beset them"*. Collaboration, stakeholder engagement, participation by residents and effective governance are key elements. Events are catalysts, and therefore the management and governance of the event sector is important to the community's well-being.

As shown by the pandemic crisis, individual events alone are more vulnerable to negative impacts. We contend, however, that if they are part of a portfolio, then they can benefit from a series of collaborative, synergistic and complementary effects. These portfolio effects can support individual events, which are expected, in turn, to create aggregate value for the portfolio. Certainly, given the perennial problem of scarce resources, tough decisions will have to be made for concerted portfolio provision. Attention should be given to both selecting those events to receive support, and to the ones allowed to cease. That is the beginnings of thorough efforts to build portfolio resilience.

Event portfolio and event population resilience

In the context of cities and destinations, the practice of portfolio management can help achieve long-term sustainability when the aim is to have a salubrious and diverse population of events. Although it is not possible to make all events resilient in any jurisdiction, the resilience of managed portfolios can ensure that the most valued events as well as a selected array of events are always present. This warrants the permanency of events in the host community as part of a systemic configuration. From a financial standpoint, portfolio resilience brings together the notions of diversification to minimize risk, which can be seen as a defensive strategy, and proactive investments to secure advantages from disruptions in the market or from a crisis. In the event sector these concepts can be applied as follows:

- ◆ **Defensive:** A diversified event portfolio will protect from any loss of target market segments by sustaining an array of event types, through the entire calendar year, in different locations and venues;
- ◆ **Proactive:** Event bids are often structured as unique opportunities for bringing a range of benefits to a city or country; direct creation of new

events or supporting innovation and entrepreneurship in the event sector is also proactive.

Nevertheless, it should be emphasized that normal portfolio resilience strategies will not necessarily be sufficient when a major crisis shuts down entire economic sectors, including travel, hospitality and events. Godschalk (2003) proposed critical elements in building resilient systems, which can be viewed as goals in resilience planning for event portfolios or the event sector overall. Accordingly, we contextualize these elements in the events realm below:

- 1 **Redundancy:** Failure of one or more events cannot be allowed to disintegrate the entire portfolio or population. Thus, it is important to ascertain from the outset which events must carry on, foster multiple nodes in the network for obtaining and sharing resources, ensure multiple venues are available for key events, and work along with other agencies, the private sector and other layers of government to manage portfolios. A minimum strategy is, at least, to coordinate overlapping event portfolios with each of them performing important functions for different strategic and policy purposes.
- 2 **Diversity:** The values and goals should be explicit in creating a balanced portfolio, encompassing all types of events, with an annual program; further goals should be to attract multiple target markets, cater to diverse social and cultural interest groups, and provide services and experiences to all segments of society.
- 3 **Efficiency:** Here policies and procedures should be introduced and established to ensure the efficient allocation of resources. For example, should financially vulnerable events that fail in a crisis be saved? Portfolio managers have to know where and how scarce resources get allocated, and in doing so, it is pivotal to decide if priority should be given to sustain permanent hallmark events or to create new ones and perhaps bid for one-off events.
- 4 **Autonomy:** Portfolio management does not suggest a lack of autonomy to facilitate independent action by events and other organizations to respond to a crisis by following their own recovery plans. What is highly problematic for individual events is that they tend to develop resource dependencies on key stakeholders and there are also controls imposed by regulators that can limit an event's capacity to take protective and recovery action. On the other hand, portfolios can manage this structural weakness of individual events. A crucial matter is how to coordinate a portfolio of events that sustains both synergies and autonomy.
- 5 **Strength:** Robust events, venues and suppliers should be able to withstand threats or absorb shocks. Strength can be amplified and optimized at the portfolio level, not the level of individual events or whole populations. Social systems are inherently strong as evidenced by community-

based initiatives to help people cope with the crisis and support events. Here it is essential to preserve previous market demand and/or attract new segments to events. Also, effort is required to secure the return of volunteers and staff or foresee the need to recruit new ones.

- 6 Interdependence:** Events are interconnected elements in a portfolio as a systemic configuration. This is a fundamental principle of portfolio management, realized through fostering strong networks, versatile synergies and common goals.
- 7 Governance:** Typically one focal organization leads in portfolio development and management. Nevertheless, in many cities and destinations there are multiple portfolios to take into account, generating additional governance challenges. Effective portfolio governance requires collaboration and networking within a distinct policy structure as well as dedicated action planning specific to events.
- 8 Adaptability:** To optimize adaptability it is essential to facilitate learning in events by applying evidence-based decision-making at the organizational and portfolio levels; this requires a comprehensive system of controls, evaluation and impact assessment. Also, it is important to provide guidance and support on organizational change, to share experiences from a crisis and to constantly modify the portfolio by reflecting on environmental conditions and trends.
- 9 Collaboration:** Event portfolios are contingent upon collaboration among different stakeholders. As such, portfolio managers should aim to strengthen existing collaborative networks and forge new cross-industry partnerships or community alliances. Residents, representing the local population and not just a customer base or target segments, are always a key stakeholder group requiring regular communication, consultation and research on values, attitudes and perceived impacts. How residents react to the crisis and its effects determine future possibilities for the event sector.

On the whole, the above elements are useful for elaborating on the properties and attributes of event portfolios, which contribute to resilience. Based on this analysis, we distinguish a set of key processes that make up portfolio resilience. These processes can produce significant added value to the event sector in times of crisis. As noted earlier, the portfolio processes are inherently integrative and systemic concerning how different events as interconnected elements are reconfigured to form a new whole program that adapts to environmental changes (Antchak et al., 2019; Ziakas, 2019, 2020; Ziakas & Costa, 2010). In particular, we discern five processes: network synergies, operational efficiencies, multipronged leverage, market complementarities, and ecosystem continuity. Each process is explained below as follows.

Network synergies

Bringing together a range of stakeholders in a portfolio may develop relationships and foster collaboration. Stakeholder exchanges and interactions create a network that is instrumental for portfolio planning and delivery. Coordination of the event portfolio network is crucial in order to nurture and utilize synergies among the different events and supporting organizations. Synergies can be categorized as thematic or inter-organizational. Thematic synergies strengthen the meanings of events, thereby amplifying their impact on attendees. Inter-organizational synergies facilitate the forging of alliances, the garnering of community support and the establishment of local supply chains, which are required for the effective implementation of individual events and the whole portfolio. A well-coordinated event portfolio network can cultivate and sustain collective action, which is vital for enabling collaboration across the array of events. This calls for the formation or appointment of a local agency with the responsibility to coordinate the portfolio network, relationship-building and stakeholder management. Garnering wide-ranging community support for the portfolio may also engender opportunities for attracting alternative sources of funding from corporate and civic groups.

Operational efficiencies

Portfolio implementation is reliant on an integrated set of resources that are used interchangeably across events. Deploying shared resources can reduce operational costs as there will not be a need to find required resources from other sources. For instance, the same venues and facilities can be used, and volunteers can be chosen from a common volunteer pool. The goal is to attain the optimal use of resources avoiding their under-utilization or depletion. If demand for events exceeds resource capacity, then this is a sign that no further event development should be taken in the portfolio. If, on the other hand, several resources are not used, further investment is needed to build demand for events and develop new ones in the portfolio. Likewise, the portfolio context enables resource development to take place through knowledge exchange and investing in common assets.

Portfolio efficiency is also apparent in the execution of leveraging strategies and tactics aimed to obtain, amplify, and sustain event benefits. Leveraging requires that joint strategies be crafted to achieve multiple outcomes. Simply put, one action should seek out to obtain several benefits. For instance, if we lengthen the duration of an event, then visitor stays and expenditures will be increased, exposure of event messages boosted, destination experience enhanced, and the festival atmosphere elevated with augmentations to the program. These benefits can then be magnified providing that the same strategy is employed for selected events in the portfolio. To achieve this, portfolio efficiency stipulates another critical function: the synchronization of events and activities, which prevent overflows or time conflicts. For example, events

can be scheduled in the off-peak period to overcome seasonality or sequenced across specific periods to build momentum and attract tourist flows. Synchronizing a portfolio, therefore, dictates the optimal sequencing of events, comprehensive programming and timely scheduling.

Multipronged leverage

Event portfolio management is based on a multipronged strategic approach that indicates the value of a balanced composition synergizing different event types in a portfolio. Balance further relates to the economic and social benefits being sought. To reach balance, multipronged portfolio leverage takes into account multiple perspectives and views, which are represented by the different events, and creates participatory mechanisms for stakeholder dialogue, deliberation and consensus-building. The array of events is viewed as a coherent group of assets that provide opportunities for community interventions. Based upon local consultation, interventions can be undertaken in the form of programs, campaigns or other actions to amplify the portfolio benefits. This requires a comprehensive view of events and their elements, community assets and intended outcomes. The underlying purpose is to identify ways to integrate events and the portfolio into the local mix of products and services that can enable cross-leverage between community assets and events. Comprehensiveness of portfolio leverage develops strategic acumen and ability to adapt events and strategies according to environmental changes and new conditions.

Market complementarities

A portfolio can augment a community's market reach through the array of events that target supplementary audiences with different motivations and interests. For example, core markets can be served alongside accompanying and incidental markets by building up events and activities in the portfolio that appeal to each of them. As a result, there is a need for comprehensive design of the marketing mix of a portfolio, rather than of each single event as current praxis tends to do. A change of mind-set is thus imperative. This considers each event (and its elements) as part of the portfolio marketing mix and the challenge is to interrelate and synergize the different events based on the overall marketing strategy. From this perspective, market complementarities can be leveraged. Complementarity concerns three domains: (1) expanding audience reach through the number of events offered and their scope, (2) replacing missed audiences with further events that attract new markets, and (3) developing niche markets through specialized events.

Ecosystem continuity

Portfolio thinking principally entails the strategic patterning of events into a system. Unavoidably, through time some events will fail while others will

carry on. The portfolio, however, will remain as a structure keeping consistency and integrity of event-related offerings at the host community. Subsequently, a comprehensive stance on portfolios serves the overarching purpose to maintain their continuity as service ecosystems. From this perspective, the matter is how each event contributes to the ecosystem; on this ground, decisions can be made as to which events should be terminated and which ones to be kept and assisted. In a similar vein, the turn to digital events needs to be assessed in terms of how it affects the portfolio and what should be the balance between digital and live events. Learning can be generated in this manner to improve portfolio implementation and adaptability to changing conditions. The primary aim is to guard the event portfolio ecosystem continuity. Concerted action that builds the strength of a portfolio and ensures its continuity can have positive effects on the reputation and image of the host community as an event provider.

The aforementioned processes, when acting in tandem, contribute cumulatively to building portfolio resilience. As depicted in Figure 1.4, portfolio resilience comprises the following interdependent domains: balance, synergies, community support, learning and adaptability/flexibility. In all, these elements generate opportunities for creativity, joint marketing, resource-sharing and synergistic strategy-making to deal with volatility and turbulent change. We contend that this is a practical, realistic, comprehensive and systematic means to enhance the resilience of the event sector, especially in times of crisis.

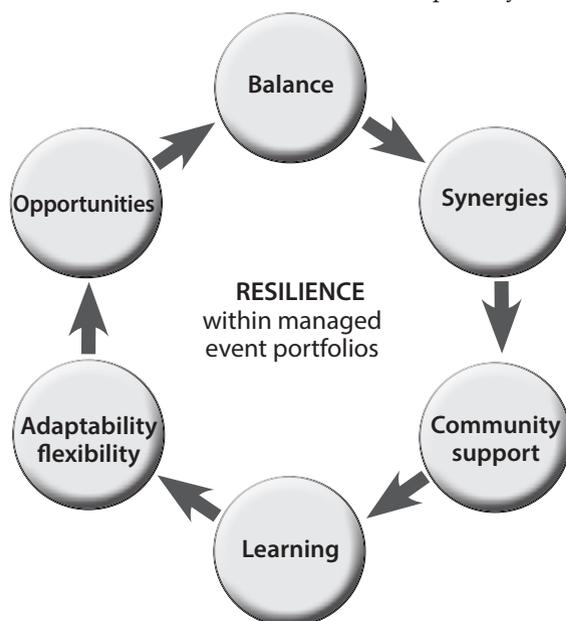


Figure 1.4: Building resilience in the event sector

Conclusion

The arrival of COVID-19 crisis exposed the fragility of the event sector with often erratic, unplanned foundations in many cities and destinations. It also accelerated structural change, reconfiguring key assumptions, practices and processes. The new landscape of the event sector has to move now, more than ever, from its innate fragmentation to integrated models of event management and develop event-focused frameworks for crisis management if it is to build resilience in the sector. This calls for a change in mind-set both in theory and praxis. In this chapter, we outlined fundamental principles of a holistic mind-set and directions towards generating specific theory in the complex area of crisis management and recovery for events. This makes up an important area for future research and thus requires considerable scholarly attention. The chapter establishes firm foundations for reshaping the event sector utilizing complex systems theory, resilience principles and the event portfolio perspective as a way to nurture a holistic mind-set on crisis management for events.

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