Guide to Developing Case Studies

Contact

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Executive Summary

This document provides guidelines for the development and presentation of the JMIC case studies.

Interest in contributing a case study should be expressed to the contact above, and a case study interest form should be completed and submitted. This form (and any additional materials provided) will be forwarded to the International Advisory Panel for review. The panel will select potential case studies.

A case study should look beyond meeting-related direct and indirect expenditure and instead focus on benefits that can illustrate the broader values arising from meetings. The benefits should be convincingly described and supported by data, which may be collected through the review of existing documents (eg, conference reports, media reports etc), observation, surveys/interviews/focus groups with key stakeholders. Some assistance is provided by UTS but case study contributors are encouraged to seek help from research partners (e.g. universities) for any research necessary.

All case studies are limited to a length of approximately 5,000-10,000 words and should follow the same structure: 1) case study title and author details, 2) abstract, 3) introduction, 4) methodology, 5) key benefits realised, 6) discussion and conclusions. The case studies should also follow the format guidelines outlined. A word document template is available for authors to use.

Project rationale

The Value of Meetings Case Study Project conducted by the University of Technology Sydney (UTS) and commissioned by JMIC will document the benefits, contributions and legacies of meetings through the execution of a series of case studies. The idea is to demonstrate the value of meetings beyond economic impacts. An international board of academic experts in the field (see Appendix 1) will oversee the work.

Adopting a sound methodological framework and using defined and accepted measures for assessing meeting outcomes in the development of the case studies will assist the Meetings Industry in convincingly arguing the value of meetings across stakeholder groups.

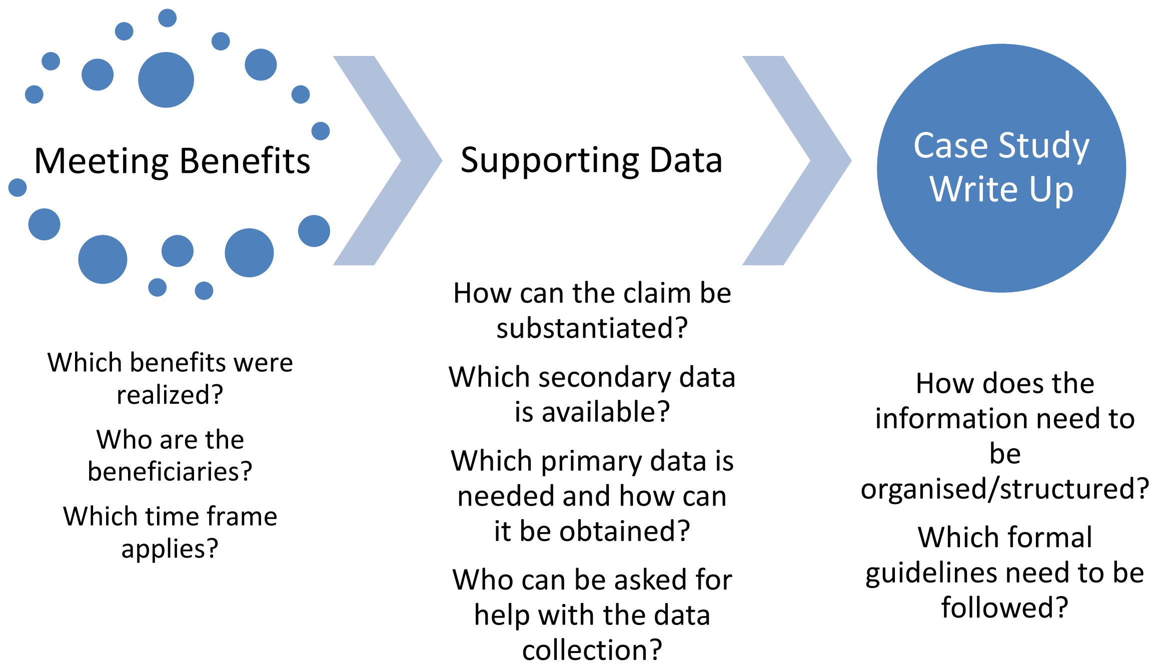
The project aims to capture the diversity of the meetings industry by including cases that differ in the type of meeting, size of meeting, geographical location and industry sector.

What should the case study be about?

The case study should focus on any benefits (i.e. business, social, professional, innovation, sustainability, educational, destination, community) that can illustrate the broader values arising from meetings. The benefits should be convincingly described with help of data (see section Supporting Data). If applicable, the case study may also outline how the occurrence of these benefits was fostered or facilitated by the organisers and/or stakeholders through structures / processes, before / during / after the event.

The case study needs to be delimited. In other words you need to make a clear decision to NOT include some information in order to keep the case study focused and limited in length (approximately 5,000-10,000 words in total). The graph below represents the procedural process and content requirement of the case studies. You can use this as a guide to delimitate your case.

Figure 1: Procedural process and content requirement of the case study



Meeting benefits

A powerful case study will focus on key benefits that the meeting was particularly successful in generating rather than providing an exhaustive list of the meeting benefits.

Areas of benefit may include, but are not restricted to:

- Knowledge expansion (e.g. new ideas, technologies, techniques);
- Networking, relationship building, collaboration;
- Attraction of global talent;
- Improving education;
- Increasing sales/opening up new markets;
- Fundraising and investment;
- Raising awareness among and beyond industry/academia;
- Increasing the sustainability of events;
- Contributions to community and communal quality of life; and
- Shaping of destination image, its research and educational capacity, and business performance (see also Appendix 2).

Indeed we hope that your case would highlight as yet undiscovered benefits.

It is important for the case study to point to specific examples. In order for such examples to be convincing, it is imperative to clearly link the benefits to the respective beneficiaries, and note when and where the benefits occur. This is done by making a clear selection of stakeholder group(s) / perspective(s) that you want to focus on in the analysis.

In other words, you decide through which eyes you would like to look at the meetings benefits. You may decide to adopt one or several of the following perspectives: delegate, commercial / public / not-for-profit enterprise, industry sector, host community, association, regional economy, university, destination or other. Including several perspectives usually enhance the quality of the case study significantly.

The value created by a meeting is dependent on the expectations, whether these are personal expectations, business objectives or other. Clarifying the expectations of the stakeholders under study will be useful in understanding the benefit assessment.

Supporting Data - Measuring Meeting Benefits

For a case study to be credible the description of the benefits needs to be supported by data, which comprise numerical facts but also statements by informants or observations. Evidence may be retrieved from a number of data sources.

Data Sources

The most common ways to obtain data are:

- Review of published and unpublished written materials;
- Surveys;
- Interviews with key informants; and
- Observation including field notes.

In general, a review of the (un)published materials on offer will not be sufficient to write the case study, and some primary data collection will be necessary. A range of stakeholders can be approached, for example: conference organisers, association heads, meeting/conference delegates, sponsors and exhibitors, business and industry representatives, destination and community representatives.

It is recommended that people be approached who are in a position to provide informed and credible evidence on a particular range of meeting benefits. Who these are depends on the benefits analysed and the stakeholder perspective(s) adopted.

Including results from multiple data sources will strengthen the credibility of the case study and is therefore highly recommended.

Moreover, the case study may benefit from the inclusion of data that covers different time frames (pre-event, during, post-event with short- and long-term effects).

Secondary data sources: Published and unpublished materials

Desk research of the materials already available will help to minimise costs associated with primary data collection, and may help to define the focus of the case study. So-called secondary data includes all materials and data not collected specifically for the present case study project.

Materials may be obtained from e.g. meeting organizers, associations, companies, government and regulatory bodies, the press, other (academic) research. Materials may include internal reports (e.g. planning and assessment documents) and memoranda, organizational archives, and previous (un)published research.

Documents may refer to past events or elements of the present event. Only trustworthy secondary data should be included. In other words, the data source and the materials should be critically reviewed and be considered valid and reliable.

Questions like: 'How was the data obtained?' and 'To what extent has the raw data been processed?', 'What was the original purpose of the data collection?', 'Who is responsible for the data collection and analyses?' will help to assess the trustworthiness of the source and the materials.

If you are using (un)published materials please make sure that you reference the works appropriately (see Appendix 4).

Primary data: Surveys, interviews with key informants and observation including field notes

Primary data is collected specifically for the current project. It can be specifically tailored to the research focus but usually entails higher costs than the use of secondary data.

Primary data can be gathered through various methods:

- Surveys: based on a questionnaire including closed- and/or open-ended questions, and distributed by postal mail, telephone, internet or in person with a sample taken from a defined population.
- Interviews: predominantly with one person at a time; generally based on an interview guide that is structured to varying degrees with guiding questions / issues, and conducted in person or by phone / internet.
- Focus groups: conducted in person with several people at the same time; generally based on a discussion guide with guiding questions / issues.
- Observations: may be conducted by passively observing or actively participating in the event.

The choice of method(s) will depend on the benefits you are examining and the stakeholder perspective taken.

Data Collection

Reviewing secondary data sources, and designing and collecting primary data are work-intensive tasks. Involving a university or academic as a project partner, can assist you to collect credible data, write the case study for you will enable you to keep additional work to a minimum.

Please make note of the information on data collection and storage in Appendix 3.

Case Study Write Up

Data Analysis and Presentation

The analysis of the data is dependent on the type of data obtained:

- Quantitative data (structured information quantified in numbers): If you are using a survey methodology then the data should be presented in tables and graphs with associated explanatory text. Dependent on the types of responses, different statistical analyses can be conducted such as descriptive statistics, cross tabs and t-tests.
- Qualitative data (open-ended text from interviews, workshops, focus groups, etc. that explore a research issue, e.g. opinions, personal reasons, motives and outcomes); should be analysed and grouped under emergent key themes. Qualitative data can also be presented

in tables, but generally involves more text including quotes from people that illustrate the findings.

If you are collecting qualitative data, make sure that your participants are happy to be quoted in your case study (this usually requires a signed consent form). If they are not, you will have to anonymise the data (i.e. use a fictional name). If you are collecting quantitative data and you are including questions that can identify the respondent, these need to be deleted from the data file before data analysis and stored separately (if needed for a prize draw or similar).

Contents structure

The overview below outlines the major elements of the case study.

The case study should be between 5,000 and 10,000 words in length (including references).

Section	Contents
Case Study Title	Case study title Author first and last names Author affiliation(s)
Abstract	Short structured summary covering the following case study aspects: Type of meeting Size of meeting Geographical location of meeting Industry sector Methodological approach Key benefits realized Main beneficiaries Relevance / Implications/Lessons Learnt Future research Key words
Introduction	Sets the scene, describes the event and its particularities such as the context, any unique challenges / opportunities, and relevant circumstances Shortly outlines the focus of the case study: key benefits and their importance (role/importance of these benefits to stakeholders), beneficiary/stakeholder perspective(s) adopted, time perspectives included (pre-event, during event, immediately after the event, long tail)
Methodology	Which data were used to document the event benefits realized (secondary data, primary data) How were the data obtained? (details on data collection) How were the data analysed Outline any ethical considerations (e.g. confidentiality, ways in which any risks to participants were managed)
Key benefits realised: Description of benefits from stakeholder view(s)	Detailed discussion and justification of the benefits with the help of primary and secondary data. Dependent on the benefits focussed on, issues related to the realisation of the benefits may be discussed, e.g.

Internal & external barriers (if applicable) Role of Management structures / processes, etc. (if applicable)	Barriers that needed to be overcome (financial, HR, knowledge, legislative/political, technological, social, etc.) Management aspects that acted as barrier or driver (such as decision-making, networks/relationship management, changes in demographics, economics, government policy, environmental conditions, social imperatives) Impacts (short term/long term, for various stakeholders)
Discussion and Conclusions	Summary of the case study and discussion of relevant issues, such as: Advice on how to realize these benefits at other events Relevance of findings for communication with stakeholders (eg governments) Approaches to measuring such benefits Limitations of the approach adopted in the case study (e.g. boundaries set in regards to research focus, etc.)
References	List of secondary sources used
Appendices	If applicable, the case study may be supplemented with materials that are of interest to the reader, e.g. interview guide, survey questions, details on the people interviewed.

Case Study Format

In order to make the case studies look the same, we kindly ask you to write your case study using the format below and described in Appendix 4. For your convenience, we have formatted a word document according to the guidelines. You can use this template directly for the writing process or copy-paste the text (as "paste special" - unformatted text) into the document. The format requirements are as follows:

- All text double spaced, free line in between paragraphs and before next (sub)heading
- Heading 1: Calibri, 12, bold;
- Heading 2: Calibri, 12, italics;
- Heading 3: Calibri, 12;
- Text: Calibri, 11;
- Bullet points for unnumbered lists;
- Numbers for numbered lists with letters as sublistings.

For more details, see Appendix 4 and the document template.

Please use the spell and grammar check functions of Word before submission.

Please use Harvard referencing outlined in Appendix 4.

Appendices

Appendix 1: International Advisory Board

Name	Affiliation
Professor Larry Dwyer	University of Ljubljana (Slovenia) Griffith University (Australia) University of New South Wales (Australia)
Honorary Professor Markus Groβe Ophoff	University of Applied Sciences Osnabrück (Germany) Centre for Environmental Communication (Germany)
Professor Leo Jago	University of Surrey (UK)
Professor Qiuju (Betty) Luo	Sun Yat-sen University (PR China) Zhuhai Convention and Exhibition Association (PR China)
Professor Paul Verdin	University of Brussels (Belgium) KU Leuven (Belgium) Harvard University (USA)
Associate Professor Karin Weber	Hong Kong Polytechnic University (HK)

Appendix 2: Potential types of meetings benefits

Below are some examples of benefits associated with meetings.

Benefits / Outcomes	Delegate / Industry Perspective	Destination / Community Perspective
Knowledge expansion New knowledge, technologies, techniques best practice, international knowledge	Improving (tertiary) education and quality of graduates Improving professional practice / professional development	Growing local knowledge and capacity building Increased business competitiveness
Networking, relationship building	Long-term contact opportunity Creation of business relationships / research collaborations Generation of ideas, innovation (e.g. new products / technologies), research (agendas)	Enabling locals who are unable to travel to network with international counterparts
Educational outcomes	Research/teaching nexus – research-inspired education	Enabling local young people working / training in the sector to attend thus supporting their professional development and fostering enthusiasm for chosen career path Increasing the attractiveness of the destination's education sector and increasing future capacity
Fundraising and future research capacity Access to additional sources of funds (e.g. from government, private sector)	Increased financial support of industry / research initiatives either paralleling or resulting from event Supporting growth in future research capacity	
Raising awareness and profiling Increase of public and government awareness (e.g. through media coverage) locally and internationally	Raise profile of associated organizations Raise awareness of sector specific / broader societal issues among public, private sector and government potentially resulting in expressions of support (e.g. funding, revision of public	Raise profile of local organizations / associations / centres Increase reputation of destination as global leader

	policies)	
Increasing the sustainability of events	Increasing the reputation of the industry in regards to sustainability	Optimizing sustainability concepts of destinations Increasing the reputation of destination in regards to sustainability topics
Showcasing and Destination Reputation	Showcasing industry/exhibitor innovation	Showcasing local talent / research / practice Showcasing destination as a) a global leader, and b) a business events destination

Other benefits may include investments into local industries, quality of life effects for local communities (e.g. attractive surroundings, cultural attributes, economic wellbeing)

Appendix 3: Notes on Data Collection and Storage

Primary data (i.e. survey responses, interview transcripts, etc.) need to be stored in a secure place and kept for 7 years. Data should be available upon request by the international advisory panel to review case studies.

Costs associated with data collection and storage will not be covered or financially supported by the project.

Appendix 4: Format Guidelines

Typing of Manuscript

- Do not write text in text boxes (except if they are part of a figure).
- Use Italics for foreign words, special emphasis and in the references, not for quotes.
- Use bold for references and low-level subheadings.
- Use capital letters only for proper nouns and at the start of the sentences, and in the case study title, not for emphasis.

Styles and headings

- Use the formatted styles in the Home section of Word to format headings and subheadings, you do not have to format each heading yourself.
- Heading 1 marks the main sections of the case study, Heading 2 marks its sub-sections. You may occasionally need to use Heading 3.
- For lists, use Word bullets and numbered lists as set to default.
- If you do not write in Word, mark headings thus: <Heading 1>, <Subheading 1>.....

Figures, tables, lists and photos

Figures

- Make sure that the figures, whether created in Word or imported from another program, are clear.
- If notes are required, they should follow immediately under the figure / table:
  Note: text text …
- Sources follows notes in similar form. All notes and sources end with stop but captions do not.
- Caption follows source.

Tables

- Make sure the table fits on the Word page.
- Caption appears at the top of the table.
- Do not use vertical lines, use a minimum of horizontal lines.
- Use only superscript letters for notes, not numbers.
- Units appear under column heading in brackets, not alongside figures. If there are a variety of units, they appear in column 1 in brackets after the description. Make sure that there is no confusions which units are meant, e.g. US$ or A$, etc.

Lists

- For numbered lists, follow the pattern:
  1. Text text …
  2. Text text …
     a. Text text
     b. Text text

- For unnumbered lists, use bullet points.

Illustrations and photos

- Either embed the photographs in the Word document without compression or supply them as separate files with their position in the text indicated: <photo name here>

Numbers and dates

Numbers

- Spell out one to ten, numerals for 11 upwards, except for: ages, percentages and amounts with units when numerals should be used throughout.
- '%' is preferable to 'per cent' in text.
- Decimal points are normally preceded by a zero, except for probabilities and some statistical functions.

Dates/Times

- Spell out months in full, e.g. 1 February 2016. This helps to avoid potential confusion between UK and US ways of writing dates.
- Use 1990s, etc., i.e. no apostrophe, and 1995-98, not 1995-8.
- Use 20th, 21st century – but not superscript, e.g. 20^{th} .

Time sensitivity

- Avoid terms like 'in the last five years' as it can irritate the reader who has to try and work out when the author means.

Citations and referencing

The Harvard system is to be used (see also UTS Library Harvard Referencing Help http://www.lib.uts.edu.au/help/referencing/harvard-uts-referencing-guide).

Type of Source	**Reference example**
Books	Bloggs, J. and Smith, A. 1990, *Book Title*, 2nd edn, Cambridge: Cambridge University Press.
Chapter	Bloggs, J. & Smith, A. 1990, 'Chapter title', in J. Brown (ed.), *Book Title*, Cambridge: Cambridge University Press, pp. 10-22.
Journal article	Bloggs, J. 1990, 'Article title', *Journal of Epidemiology*, **12** (2), 23-27.
Reports, working papers, etc.	Bloggs, J. 1990, 'The state of Britain's roads', report prepared for the Ministry of Transport.
Conference papers	Bloggs, J. 1990, 'The state of Britain's roads', paper presented at the conference Britain's Roads for the Twenty-First Century, 12-14 August, London.
URLs	Department of Immigration 2011, *Fact Sheet 1 - Immigration: The Background Part One*, Canberra, viewed 5 March 2012, <http://www.immi.gov.au/media/fact-sheets/01backgd.htm>.

Author names

- All names are inverted with the first and middle names abbreviated, e.g. Bloggs, J.
- Special letters such as ø are alphabetized to the nearest English equivalent.

Publisher details

- Anglicized versions of foreign city names should be used.
- For places likely to be unfamiliar to readers the country should be added and so should the American state for all except obvious cities.
- The word 'The' is never included in the publisher name, nor are terms like Ltd, Inc, etc.

In-text references and citations

- For direct quotes include the page number, e.g. (Bloggs, 1999: 224).
- Citations within text are alphabetically ordered and separated by semicolons. Dates of different works by the same author are separated by commas and are listed with the most recent publication first. Where there is more than one entry for a year, a, b, etc. should be added in the text and the reference list.
- Three or more authors appear in the text in the form Bloggs *et al*., 1990. Where several entries appear in the text as Bloggs *et al*. they are arranged in date order irrespective of the names of the subsequent authors, as the reader won't have any idea what the subsequent author's names are.
- Personal communications appear in the text only, in the form 'Bloggs, personal communication'.
- Avoid abbreviations such as ibid.
- Use single quotes throughout, and double quotes within a quote.
- Shorter quotes should be embedded in the text. Only separate quotes as paragraphs if they have approx. 40 words or more (i.e. three lines or more).
- Footnotes should only be used where all else fails.

Permissions

Getting permissions (and any associated fees) to adhere to copyright laws is the responsibility of the author, and need to be sought and granted prior to case study submission.