THE IMPACT OF GARDEN FESTIVAL WALES ON THE LOCAL TOURISM INDUSTRY

FIONA JAYNE WILLIAMS

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DECLARATION

I hereby declare that this dissertation is the result of my own work and that due reference is made where necessary to the work of other researchers and authors.

I further declare that this dissertation has not been accepted in substance for any former degree and is not currently submitted in candidature for any other degree.

Candidate
Fiona J Williams

Director of Studies
Dr J C Evans

Supervisor
Dr M Hayes
9.2.94

Supervisor
Dr D Botterill
ABSTRACT

The concept of the garden festival was introduced to Britain by the Government as part of the regeneration process for areas with economic, environmental and social problems. The circumstances under which each of the garden festivals has operated have varied. Consequently, all of the Festival Companies have aimed to meet the basic parameters as stated by the Department of the Environment, but the priorities accorded to each festival have differed in response to local considerations. This thesis describes attempts to determine the realisation of some of the objectives of Garden Festival Wales held at Ebbw Vale in 1992. The Festival Company, Garden Festival Wales Limited, placed priority on improving the image of the area, which in turn would act as a primer for more rapid economic regeneration. Therefore, it is postulated in this study that Garden Festival Wales and the increased visitor numbers attributable to the event would have a beneficial affect on the existing local tourism industry. The criteria for assessment are the 'perceived' and 'actual' benefits attributable to Garden Festival Wales.

A multiple research approach is adopted which involves three data collection methods and results in three data sets. Sixteen visitor attractions selected for sampling purposes are all located within a 25km radius of the Garden Festival Wales site, and include heritage attractions, museums and art galleries, countryside attractions and industrial/craft attractions. Impacts are judged using a method of triangulation which combines the perceptions of the managers of the local visitor attractions with an investigation of the attitudes and opinions of visitors to those attractions. An evaluation of this primary data and the relevant secondary data is undertaken to achieve the research objectives.

Evidence is presented to demonstrate the extent to which the 'perceived' and 'actual' benefits to the local visitor attractions were attributable to Garden Festival Wales. Most of the benefits were the result of the new visitors to the area generated by the event. The occurrence of image-related benefits, expected as a consequence of the Festival, is not supported by the evidence in the study. It is concluded that, while Garden Festival Wales had a beneficial impact on the local tourism industry, this impact was modest in terms of what was expected. Possible reasons for this are explored; they include market overlap, a distinct Festival image and short-termism.

The issues addressed in this study, and its findings, are relevant to the concept of festivals and special events in a broader definition. Therefore, recommendations are presented regarding the wider application of festivals and special events as part of tourism product development and economic regeneration.
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"The impossible is possible when people align with you."

(Gita Bellin)

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LIST OF ABBREVIATIONS

B.G.B.C.  Blaenau Gwent Borough Council  
B.I.E.  Bureau International des Expositions  
B.S.C.  British Steel Corporation  
CADW  Welsh Historic Monuments  
C.S.O.  Central Statistical Office  
D.o.E.  Department of the Environment  
G.A.T.A.  Gwent Association of Tourist Attractions  
G.C.C.  Gwent County Council  
G.F.W.  Garden Festival Wales  
G.G.T.B.  Greater Glasgow Tourist Board  
G.M.B.C.  Gateshead Metropolitan Borough Council  
G.S.G.  Golley Slater Group  
J.C.L.I.  Joint Council of Landscape Industries  
M.D.C.  Merseyside Development Corporation  
N.O.P.  National Opinion Poll  
N.M.W.  National Museum of Wales  
S.D.A.  Scottish Development Agency  
S.T.B.  Scottish Tourist Board  
T.I.C.  Tourist Information Centre  
U.K.T.S.  United Kingdom Tourism Survey  
W.D.A.  Welsh Development Agency  
W.T.B.  Wales Tourist Board
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CHAPTER 1.
INTRODUCTION

"Success depends on where intention is."

(Gita Bellin)
THE ORIGINS OF THE GARDEN FESTIVAL CONCEPT

After the Second World War, the concept of the garden festival became directly associated with the bomb-damaged cities of West Germany where there was an urgent need for the physical reconstruction of selected areas of devastated land. A horticultural garden event (Bundesgartenschau) of approximately six months duration was proposed as part of a master plan for redevelopment. As a result of this, an urban park would remain as a permanent legacy for the local people. The garden festival was intended as an impetus to the regeneration process and to partly offset the associated costs. This was the background to the 1950 festival in Stuttgart, followed by a similar event in Hanover in 1951.

The garden festival philosophy has been maintained in Germany since those early events with a Government-funded organisation, the Zentralverband Gartenbau, being established to take on the major responsibilities and critical early stages of 'Bundesgartenschauen.' To allow for strong continuity from festival to festival, a clear policy framework is stipulated. 'Bundesgartenschauen' now occur in major German cities every two years. The most recent were held in Frankfurt (1989) and in Munchen Gladbach (1991).

An initiative introduced by the former West Germany has now become well established Continental practise, as other European countries have gradually adopted the concept. In addition to national garden festivals, international events have been introduced such as the 'Floriade' in the Netherlands. This was held in Amsterdam in 1972 and 1982 and in Zoetermeer in 1992. In Germany, the Munich International Garden Festival was held in 1983 with a similar international event in Stuttgart in 1993. International events come under the ruling of the Bureau International des Expositions (B.I.E.) which dictates that a country can only hold such an event every decade (Holden and Turner, 1987).

Outside Europe, the movement is in existence but less well established. A garden festival was held in Montreal, Canada in 1980 and the first garden festival to take place in the United States was the 'Ameriflora
1992' in Columbus, Ohio. The first large horticultural exposition of its kind to be held in Asia was the International Garden and Greenery Exposition at Osaka, Japan in 1990 (Grayson, 1990).

THE EVOLUTION OF THE GARDEN FESTIVAL IN BRITAIN

In Britain, the introduction of garden festivals is more recent. In 1979, the Joint Council of Landscape Industries (J.C.L.I.) lobbied Lord Bellwin, the then Minister of State at the Department of the Environment (D.o.E.), suggesting that the Government should introduce the garden festival concept as a means of inner city regeneration (Beaumont, 1985). At that time the inner cities were a growing political concern with some urban areas becoming increasingly associated with high unemployment, poor housing conditions, vandalism, poverty and decay.

In 1980, having conducted a research study to consider adapting the garden festival concept to the British inner cities, the D.o.E. produced a document for discussion, "Garden Exhibitions in the U.K." The D.o.E. expressed the view that inner city areas in need of regeneration could benefit from a festival based on horticulture and landscaping. From such a scheme permanent benefits to the local community and catalytic benefits to the area could be expected. It was intended that the festival itself would be self-financing and any public sector financial commitment would be limited to the creation of a park for long-term use. There would be a minimum lead time of five years before the opening of the event (D.o.E., 1980).

In April 1981, feasibility studies were commissioned by the D.o.E. to consider Liverpool and Stoke on Trent as hosts for two separate garden festivals because they were identified as having potential sites. These studies were completed in August 1981. In Liverpool, the inner city problem was brought sharply into focus by the extensive riots in Toxteth, in July 1981. This may have influenced Michael Heseltine, the Secretary of State for the Environment, to announce in September 1981, that Liverpool would be the host city for the first National Garden Festival. The event would take place in 1984, to be followed by a second festival to be held in Stoke in 1986.
With an intention to stage a third garden festival the D.o.E. issued an advice note in March 1983. The note specified as key objectives land reclamation, environmental improvement and economic benefits. A shorter timescale was proposed in order to achieve rapid reclamation and a higher quality landscape. Environmental improvement should occur on the site and act as a spur for improvements over a wider area, including 'image' effects. The local area should gain short-term economic benefits due to construction work, operations and franchises associated with the festival, and expenditure related spin-offs from visitors to the event. The festival and site after-use should also stimulate the landscape design and horticultural industries and provide longer-term economic benefits to the locality.

In 1984, the D.o.E. announced that Glasgow and Gateshead were to host the 1988 and 1990 National Garden Festivals, respectively, and a site in Wales was to be selected for the event in 1992. In 1986, Nicholas Edwards, Secretary of State for Wales, announced that the fifth National Garden Festival would be held in Ebbw Vale, Gwent (Figure 1.1).

**FESTIVAL LOCATION, OBJECTIVES, MANAGEMENT AND FINANCE**

In Liverpool, the Merseyside Development Corporation (M.D.C.), a D.o.E. funded 'quango,' was established in 1980. A Riverside Development Programme was already in place for a site committed to reclamation and in the M.D.C.'s ownership. It was mainly for these reasons that this site in Liverpool was designated for the first British garden festival, the organisation of which was to be the responsibility of a sub-committee of the M.D.C.

The Riverside site covered 95 hectares. Situated two and a half miles from Liverpool city centre, the area was at the southern tip of the dock system and access was poor. It consisted of former oil installations, petroleum tank farms, jetties, a municipal domestic refuse tip and the silted-up Herculaneum Dock. Waste from the tank farms contaminated the ground with oil and methane gas. Approximately 45
FIGURE 1.1 British Garden Festivals Location Map
hectares of the site were identified as suitable for the festival itself with additional areas for temporary bus and car parking (Beaumont, 1985).

The festival at Liverpool was to differ from succeeding garden festivals from the outset. Almost immediately it was elevated to international status when the Bureau International des Expositions awarded it the right to host the 1984 premier horticultural event in the world (Beaumont, 1985). This international designation, the Riverside Programme and a restricted time scale of twenty-eight months had significant implications on the festival objectives. Emphasis was placed on the speed of reclamation and the successful operation of a horticultural event.

The site chosen for the 1986 National Garden Festival in Stoke covered 94 hectares and was situated within half a mile of the city centre. The site itself was a wasteland of slag heaps, ash tips and remains of works and mines, the result of a history of iron-working, coal-mining and clay digging for the pottery industry. Industrial activity ended on the site in 1979 with the closure of the Shelton Bar Steelworks. The closure was not accompanied by any plans for redevelopment and, following an unsuccessful Enterprise Zone submission the derelict site was entered on the Land Register as surplus to requirements in 1981. A detailed ground investigation carried out in 1982 confirmed that most of the site was severely degraded (O'Connell, 1986). Stoke was not a designated area for Urban Programme assistance but the site itself had a high priority for reclamation and hence for Derelict Land Grant (PA Cambridge Economic Consultants, 1990).

Stoke City Council needed to create areas of prime development land. With the acquisition of the 1986 garden festival, priority was given to the quality and speed of reclamation of the whole site and its conversion to an after-use. On the basis of their annual reclamation allowance and without the festival acting as a catalyst it would have taken Stoke City Council fifteen years to reclaim the site (O'Toole and Robinson, 1990). Less emphasis was placed on the operational objectives of the festival itself.
Stoke had four and a half years to prepare for the event. A festival company, National Garden Festival (Stoke) 1986 Limited, was set up. The Company Board included nominees of the Secretary of State (D.o.E.) and the sponsoring institutions, in this instance Stoke on Trent City Council and Staffordshire County Council. The Senior Executives of the Festival Company were employed on a fixed contract basis. They specialised in areas such as finance, marketing, operations, events, horticulture and landscape design. The Team was supported by administrative and technical staff and was responsible for the day to day organisation of the festival. Stoke typifies the way in which British festivals have been organised and managed (Holden, 1989).

Glasgow Garden Festival 1988 Ltd. was owned by the Scottish Development Agency (S.D.A.). They worked closely with Glasgow District Council and Strathclyde Regional Council, to a lead time of four years. In 1983, when Glasgow was designated for the 1988 National Garden Festival, 36 hectares of the 48.5 hectare site were owned by Laing Homes. Situated along the south side of the River Clyde, it consisted of the disused Princes Dock and derelict warehousing. The site was non-toxic which eliminated many reclamation problems encountered at Liverpool and Stoke. The S.D.A. came to an arrangement with Laing that they would pay rent for the site over the preparation period and the event itself. Laing also received building land in lieu in various parts of Glasgow for housing development (Mann, 1990).

The objectives of the Glasgow Garden Festival placed importance on three facets in particular. Tourism was a key component of the City’s regeneration strategy (Dawson Scott, 1990). The festival was seen as making an important contribution in attracting visitors, improving the image of the City and thus enhancing the tourism profile of Glasgow. For Strathclyde Regional Council it was an opportunity to undertake infrastructural development, complementing an existing programme to bring the River Clyde into the City. The S.D.A. recognised the potential economic benefits and attempted to maximise these (O’Toole and Robinson, 1990). Overall, there was a greater awareness of environmental improvement and an emphasis given to the image-building objectives.
In November 1984, Gateshead Metropolitan Borough Council (G.M.B.C.) received approval from the Secretary of State to host the 1990 National Garden Festival thus allowing them a development period of five and a half years. The responsibility for reclamation and festival operation was that of the Festival Company, NGF '90 (Gateshead) Ltd. The Board consisted of five directors nominated by the Secretary of State for the Environment and seven directors nominated by G.M.B.C.

The 73 hectare site at Gateshead consisted of four separate areas to be linked into one. These individual sites, amounting to almost two miles in length from the centre of Gateshead to the River Tyne, contained derelict gasworks, tar works, coke works and railway sidings. Reclamation and environmental schemes were underway along the riverbank and throughout the Borough. Prior to the D.o.E. announcement, G.M.B.C. were already committed to reclaiming 8.1 hectares of the former Redheugh Gas Works and the surrounding ex-railway land. Detailed site investigations had been carried out to assess the degree of land contamination (Brandt and Rimmer, 1987).

The Gateshead National Garden Festival 1990 was considered an enabling mechanism to accomplish reclamation and site development objectives. This was emphasised by H.R.H. The Princess Royal in her contribution to the Festival Souvenir Brochure (NGF '90 (Gateshead) Ltd, 1990):

"The festival organisers set out to achieve something which had never been done before: to secure the long-term re-development of a National Garden Festival site."

All of the festivals have been managed as autonomous companies. This has facilitated the coordination of festival organisation and management under a single agency. The Companies were under no obligation to consult with the local community and hence were insulated from community pressure. Finance could be implemented in a commercially oriented way. The balance of public to private sector involvement has varied, with Stoke and Gateshead being closer to the Local Authorities, and Liverpool and Glasgow under their respective
development corporations. These differences of structure have had implications regarding the financing of each festival, resulting in considerable complexity.

Festival company expenditure is a function of the four successive operational phases involved in the garden festival process:
- detoxification, land reclamation and infrastructural work.
- site construction and preparation.
- festival operation.
- site dismantling and after-use development.

The costs are those of land acquisition and reclamation, landscaping and buildings, site services (including franchises), administration, marketing and publicity. These, combined with the capital development and operating costs of the after-use activities, comprise the total cost of the festival (PA Cambridge Economic Consultants, 1990).

At Liverpool and Stoke, the total cost for each festival was £30 million; Glasgow amounted to £41.4 million (Holden, 1989). The total expenditure at Gateshead was £60 million (O'Toole and Robinson, 1990) (Figure 1.2). According to PA Cambridge Economic Consultants,
disaggregation of these costs into public and private sector contribution is considered impossible.

Site acquisition and reclamation costs at Liverpool, Stoke and Glasgow were £9.1 million, £9.9 million and £14.6 million respectively (PA Cambridge Economic Consultants, 1990). At Gateshead the figure was £7 million (O'Toole and Robinson, 1990).

Reclamation monies have been allocated to each festival via the relevant agencies. At Liverpool this was the M.D.C., and at Glasgow it was the S.D.A. Stoke and Gateshead Local Authorities received Derelict Land Grants. Other sources of public finance include the mainline budgets of the festival sponsoring bodies, the former Manpower Services Commission Community Programme, the D.o.E. Jobs with Training Scheme and assistance under the D.o.E. Urban Programme (D.o.E., 1989).

All of the festivals have attracted sponsorship from the public and private sectors. Two types of sponsorship were pursued. 'Effective' sponsorship involved a capital contribution by the sponsor concerned whereas, 'enhanced' sponsorship involved the sponsor in financing a building, theme ride, pavilion or garden etc. The expected returns on investment for the sponsoring organisation were mainly associated with image enhancement and mass consumer targeting. The first festival at Liverpool attracted sponsorship to the value of just over £3 million (Beaumont, 1985) and as anticipated this figure increased with subsequent festivals (Figure 1.3). Stoke raised in excess of £6 million (NGF '86 (Stoke) Ltd., 1987) and Glasgow attracted over £11 million (Wilson, 1988). Sponsorship was a crucial factor to the Gateshead programme. NGF '90 (Gateshead) Ltd. raised over £20 million with commitment from private sector companies such as Sir Robert McAlpine, Shepherd Homes, Newcastle Breweries and public sector organisations such as the Tyne and Wear Development Corporation and the Northern Regional Health Authority (NGF '90(Gateshead) Ltd., 1990).
Income is derived during and after the festival period. This is in the form of admission charges and proceeds from commercial operations such as commission on sales and payments for sole supplier agreements and the sale of assets when the festival is over. With garden festivals expected to be self-financing (D.o.E., 1980) it appears that public sector expenditure is intended to act as a catalyst to private sector contributions and that the event is priced to cover the running costs of the festival.

It would appear that the British garden festival has been an evolving experiment where the priorities accorded to each festival have differed in response to local considerations. In practise, the perceptions of the people involved combined with the incorporation of their predecessors' practical experience, have influenced the emphasis on different aspects of policy objectives. The priorities have been acknowledged at an early stage of each festival and therefore correspond with the integral functions of the process and ultimately the outcomes.

There has also been considerable flexibility in the approach to site after-use. The creation of permanent urban park land has not been a priority. Lord Skelmersdale, former Government spokesman for the D.o.E., publicly stated at the Landscape Industries Conference, Keele (1986), that Britain did not need large new parks and it was intended
that garden festivals would not be used for that purpose (Aldous, 1986). The view taken was that the garden festival was to stimulate private sector investment and provide a landscape structure for housing, educational and civic development on a specified site.

RESEARCH AND EVALUATION

As a result of the flexible and experimental policy approach to garden festivals in Britain it has proved difficult to judge their success. However, this would appear to be true of other national and international festivals and special events in general. Ritchie (1984) points out that the conceptual and research issues associated with assessing the costs and benefits of festivals and special events in a broader definition, tend to focus on the economic impacts. These are usually the positive ones, such as increased revenues and employment created by the event.

There are many examples of this type of assessment. Ritchie and Beliveau (1974) carried out a cross-sectional study of the Quebec Winter Carnaval to determine the economic returns attributable to the event. The results were that the Carnaval had a pronounced effect on the level of travel expenditures in the Metropolitan Quebec City Region during the period of the event. When compared with a city with no Carnaval such as Montreal, during the same period, it was found that Quebec was more economically active as far as travel receipts were concerned. It was concluded that the apparent profitability of such events spawned a number of attempts to create similar events in order to share in the economic benefits available. To be successful, it was necessary for the event in question to be a constantly evolving product, with a long-term perspective, have strong local support and a continuing organisational structure.

Della Bitta and Loudon (1975) developed a research method to assess the impacts of short-duration tourist events. They applied this method to investigate the affect of an annual event, the Newport International Sailboat Show, on the economy of Rhode Island. It was determined that the event had a substantial net economic benefit to the State.
The British Columbia Winter Games of 1989 were examined by Murphy and Carmichael (1991). The games were held in Nelson, located in the mountainous interior of that Province. Nelson was attempting to develop its tourism industry as traditional industries were in decline. In providing a method for measuring the tourism expenditure associated with an open-access event, they confirmed that a regional sports festival can make a significant contribution to a local economy.

In Spring 1991, the Scottish Tourist Board, Lothian and Edinburgh Enterprise Limited, the City of Edinburgh District Council and Lothian Regional Council commissioned Scotinform to carry out a study of the nine major festivals which take place in Edinburgh each year. The research was commissioned in order to assess the economic impact of the festivals, both nationally and locally, and to provide data on the profile of visitors to each festival. The results show that £44 million of direct expenditure in Edinburgh and the Lothians meant £9 million local income and 1,300 full-time equivalent jobs (Scotinform Ltd., 1992). These economic benefits would not exist if the festivals did not take place. In Scotland as a whole, direct expenditure measured £72 million and resulted in over 3,000 full-time equivalent jobs. Other economic benefits, such as the possibility that the festivals may encourage people to re-visit Edinburgh and Scotland at non-festival times, were acknowledged in the report but were more difficult to measure so were not part of the investigation.

Van Der Lee and Williams (1986) assert that, although expenditure by visitors to an event is often the most tangible tourism benefit, there are other short and long-term, individually, unquantifiable benefits that are of greater value than the visitor expenditure impact. Using the 1985 Adelaide Formula One Grand Prix as a case study, they outline repeat visitation, visits generated by word of mouth publicity, electronic and print media exposure, image and awareness enhancement and tourism investment motivation as examples of such benefits. Ritchie (1984) states that these tourism and commercial impacts are recognised as important outcomes and it is generally assumed that these impacts are primarily positive in nature. However, little attention has been paid to
assessing their significance owing to difficulties associated with their measurement.

Few studies document the extent to which sponsorship of events based on the assumption that the event leads to the enhancement of the awareness and reputation of the host region is valid. Ritchie (1984) considers that negative tourism and commercial outcomes do exist and that event organisers should recognise that promoting the event may be met with opposition. Development may favour the region as a whole but it may also have a negative impact on particular individuals and firms in terms of competition and diverted trade.

In terms of the garden festival in Britain, Cass (1987) argues that the Government places too much emphasis on their commercial success, using criteria such as high visitor numbers, net cost and the ratio of public to private expenditure. As a result landscape issues are secondary and the opportunity to maximise the potential afforded by garden festivals for long-term investment in the landscape infrastructure in towns and cities is lost. This view is supported by Porter (1990) who comments that priorities are accorded more on economic than environmental benefits.

This criticism highlights the vagueness surrounding the concept of the garden festival in Britain. Smith (1986) argues that the festivals at Liverpool, and Stoke lacked a clear and enduring purpose and a 'sense of place,' capable of surviving after the operation of the festival. He points out:

"There has been much uncertainty about all kinds of issues related to the garden festivals and their design and planning, especially their overall purpose."

With no set criteria by which to judge the 'success' of a garden festival because of the different emphasis on objectives, the first four festivals all adhered to the overall objectives outlined by the Government but placed a differing priority on each of these, making it extremely difficult to compare their success. Copeland (1987), Executive Director of NGF '90 (Gateshead) Ltd, stated:
"There is no right and wrong and those who will measure and judge its success will draw on different criteria to meet differing objectives."

As a result, evaluative studies tend to consider each festival as a separate entity and there has been little attempt at any comparative study. Much of the evaluative research associated with the garden festival in Great Britain focuses on economic objectives, both short and long-term. The majority of this research contributes to the body of research on the economic impact of festivals and events in general. It is based on data collected during the festival period for marketing purposes.

National Opinion Poll (N.O.P.) Market Research Limited was commissioned by the D.o.E. to conduct a survey of visitors at both the Liverpool International Garden Festival and the Stoke National Garden Festival. The aim was to produce data in order to assess the 'market attraction' of the festivals and to aid the planning and management of future garden festivals in Britain. Information was collected on the demographic profile of visitors, catchment area and mode of transport, reasons for visiting, on-site expenditure and behaviour, reactions to the festival including satisfaction levels and perceived value-for-money. Visitor exit surveys were carried out at both the Glasgow and Gateshead Garden Festivals. These exit polls contribute to an evaluation of each festival in terms of its success as a visitor attraction and often form the basis of statements concerning the wider economic impact on the region attributed to the festival.

Wornell (1985) states that, by attracting almost 3.4 million visitors while its target figure was 3 million the Liverpool International Garden Festival was successful as a visitor attraction. Fifty-two per cent of those visitors were from outside the Merseyside area. He concludes that this establishes the credibility of the garden festival in Britain as a visitor attraction, but points out that the Liverpool Festival was helped by good weather and the nature of the catchment area. The N.O.P. Survey recorded about 95 per cent user-satisfaction (Beaumont, 1985).
Regarding the wider impact of the Liverpool International Garden Festival, the N.O.P. research suggests that Merseyside received about a quarter of a million extra bed-nights due to the festival, of which 170,000 were in hotels, motels or guest houses. Approximately 10 per cent of visitors (344,000) to the festival visited other attractions on Merseyside and about 13 per cent (447,000) said that they would be spending money off-site. According to N.O.P. Market Research Ltd. (1985) this amounted to £3 million over the whole season, £2.8 million of which was by visitors from beyond Merseyside. However, Wilsher (1985) recognised a reluctance by the travel trade to include Merseyside in their programmes on anything other than a day visit. A visit to the Liverpool International Garden Festival required at least a whole day which meant that there was little likelihood of people wishing to visit other attractions if they were solely on a day trip.

In 1985, the Assistant Tourism Development Officer for Merseyside County Council, Pam Wilsher stated that a substitution of visits took place and the annual outings of schools, Women's Institutes etc tended to be to the festival and not to other attractions in the area. Visits to local attractions by people in the North West were also lower than normal. It is assumed that they took advantage of the festival season tickets.

Wilsher (1985) confirms that some 350 temporary jobs were created by the festival and assumes that extra staff were recruited throughout the Merseyside tourist trade to cater for the extra visitors during the garden festival period. However, she states that it is very difficult to estimate the impact of the festival on employment because of the difficulty in determining how many of these jobs became permanent.

In operational terms, the Stoke-on-Trent Garden Festival was considered by Holden (1989) to be less successful than its Liverpool counterpart. There were 2,250,000 visitors in total, less than expected and consequently the festival operated at a loss. He attributes this to wet and windy weather during the summer of 1986 and also poor marketing on behalf of the Festival Company.
The economic benefits of the Stoke garden festival were stated in the NGF Chairman's Report (1987). These included estimated off-site spending by visitors of £7.2 million and a heightened awareness and improved image of the area, the multiplier effect of tourists making repeat visits to the area and availability of skilled staff to provide employers with improved performances. The festival provided employment for 1,280 people and the Festival Company assumed that it created 430 long term jobs. The N.O.P. survey undertaken at the festival accounted for some of this information but is unclear on what data the other assertions were based. This suggests some subjectivity in the evaluation of potential wider benefits.

Glasgow Garden Festival 1988 Limited placed greater emphasis on marketing the festival and consequently attracted 4.3 million visitors (Holden, 1989). As a result, this was of definite benefit to the local tourism industry and the image of Glasgow was improved (Leverton, Prescott, Delpak and Wang, 1992). It would appear that such assertions were based on the poll undertaken during the festival period. However, very little time had elapsed in order to assess how far these image-building effects locally were translated into regeneration effects over the wider area. The Scottish Tourist Board (S.T.B.) in conjunction with the Greater Glasgow Tourist Board (G.G.T.B.) interviewed 838 people as they were leaving the S.T.B./G.G.T.B. Tourist Information Centre (T.I.C.), which was located on the garden festival site. Thirty-nine per cent of respondents were looking for information about Glasgow and 44 per cent were looking for information about other parts of Scotland. It was suggested in the report that followed that Glasgow Garden Festival assisted in dispersing tourism throughout Scotland (S.T.B./G.G.T.B., 1988).

The Gateshead Garden Festival attracted over 3 million visitors. Figures extracted from the exit poll indicated that 42 per cent of these were from outside the Tyne-Tees area (G.M.B.C., 1992). Following this, a Festival Impact Survey was undertaken in November 1990. Huntley Associates were commissioned by NGF '90 (Gateshead) Limited to carry out a formalised assessment of the impact that the festival had on the local tourism industry. The sample consisted of 100 representatives from tourist organisations and companies over Tyne
and Wear, Northumberland, Durham and Cleveland. Seventy-six per cent of respondents considered that the number of visitors to the region had increased while 59 per cent attributed this increase to the garden festival. Ninety-two per cent considered that the National Garden Festival had a positive impact on tourism in the North-East, by attracting more outsiders to the area. This helped to increase awareness and improve the image.

These economic assessments of garden festivals appear to support the claims of Cass (1987) and Porter (1990) that there is a tendency towards evaluation based on the long and short-term economic benefits stipulated by the Government. An objective seemingly overlooked is the contribution of the garden festival to the environment in the long-term and to the landscape industries.

Beaumont (1992) believes that the International Garden Festival at Liverpool was a unique opportunity for the landscape profession to be seen as the lead design profession in a major project. He states that the festival acted as a 'shop window' which influenced other projects and encouraged the growth of urban landscape projects in the 1980's. However, he comments that the quality of the overall landscape at the Stoke, Glasgow and Gateshead Festivals was marginalised resulting from an increasing emphasis on marketing and events in pursuit of the necessity to break-even.

Fieldhouse (1988) recognises the Glasgow Garden Festival was an ideal opportunity to achieve individual and corporate promotion within the landscape industries sector and expresses disappointment at their lack of presence. He questions whether the visitors to the festival recognised or appreciated the garden origins or were attracted by the commercial aspects. Clouston (1986) and Porter (1990) both comment that the landscape element seems to have become secondary to the entertainment function of festivals and that the events have become more important than the concept.

Because of local political and financial arguments the Liverpool site was not converted to the desired long-term after-use that had been conceived in the initial masterplan. Liverpool City Council reneged on
its undertaking to adopt the site as a sports and recreation area (Mann, 1990). The central road, an essential feature of any development was not built until 1986, two years after the festival had taken place. However, in 1985 the M.D.C. did open 34 hectares of the festival gardens and spent £400,000 on remodelling them. In 1986, the M.D.C. handed over those gardens to Transworld Limited who operated them commercially. The Company later went bankrupt due to commitments elsewhere and the M.D.C. were once again forced to take control. They maintained the gardens and parkland, opening the area on a low key basis, punctuated by the occasional event such as a pop concert or a motor show. In 1988, a company called Maximum Entertainment took control with the intention of gradually increasing the attractions and visitor number over several years.

This £10 million development, described as a 'garden suburb' came about after an agreement between the housebuilder Barratt Chester and the M.D.C. In July 1989, work began on the construction of 180 homes on 19 hectares of the original site (Mann, 1990). Towards the end of 1991, work began on another £10 million programme to convert the remaining 36 hectares into a pleasure park. The company Tomorrow's Leisure secured a 125 year lease on the site from the M.D.C. with a £1 million grant towards development (Faux, 1992).

As with Liverpool, the after-use of the Stoke site was not effectively planned from the outset. Responsibility for this was with Stoke City Estates Department who were quite separate from the Festival Company. A Birmingham-based property company, St. Modwen Developments Limited, took out a 150 year lease on most of the site from Stoke City Council. Their strategy was to create 'Festival Park' introducing leisure, industrial and retail development and including proposals for a hotel, a cinema, offices and a business park. In 1988, the three year commercial development period to build Festival Park began. The remainder of the site was owned by British Waterways; this included a marina and a public house (Holden, 1989). Of the first four festival sites, Festival Park is considered by Porter (1990) to be the most successful at attracting post-festival investment.
Most of the Glasgow site was already committed to private housing development before the festival was considered. The intention from the outset was that much of the festival landscape work would be removed. However, after the event Glasgow District Council and the local inhabitants of the Govan district of the City protested that there would be no permanent benefit for local people if the housing development went ahead. Subsequent negotiations between Laing Homes and the S.D.A. resulted in an amended scheme with 4.5 hectares of festival parkland being donated to the City as a permanent feature. Final planning consent was given to the amended scheme in October 1989. The total housing development, covering 23.5 hectares represented a £100 million investment (Mann, 1990). Work on the business park was delayed by the City Council in an effort to ensure that firms moving in represented inward investment from outside and did not consist of existing companies relocating from Glasgow city centre. The land allocated to this has now been sold back to the S.D.A. (Beaumont, 1992).

In an attempt to overcome the problems encountered by previous festivals concerning after-use development, Gateshead exerted a tight control on site after-use at an early stage, finalising it well in advance of the festival opening. They proposed to develop 60 per cent of the site, with 40 per cent remaining in landscaped festival form (Mann, 1990). The Council issued a brief demanding a mix of rented and private housing and sport, leisure and recreation uses for the riverside site. Shepherd Homes and McAlpine were the two housing associations to be involved with the developments (Stansfield, 1990).

From the outset, Central Government has argued that garden festivals are a means of stimulating private investment on particular sites and that the garden festival in Britain is not intended to create long term parkland. As a result, the festival sites have been sold for development, with only a small element being left for public open space. Many U.K. landscape architects are embittered by this. Porter (1990) considers the money spent on temporary landscape as money wasted. This belief is supported by Clouston (1986) who states that:
"Garden festivals are the prelude to a longer term investment in open space planning. If we continue to compromise that principle I fear all is lost."

Cass (1987) airs a similar grievance:

"If garden festivals end up as glorified flower shows on previously derelict land, then we will have thrown away an important opportunity to improve the landscape and strengthen the profession."

The landscape profession argues that the opportunities afforded by the garden festivals have been lost at the expense of the local community. In order to investigate this issue, the Calouste Gulbenkian Foundation commissioned an independent review of the longer term social gains to the local communities of the first four garden festivals. As a result of that review a report was produced by the Department of Town and Country Planning at the University of Newcastle Upon Tyne, that considered the environmental benefits, access, economic and employment benefits on the basis of the implicit assumption that garden festivals should substantially benefit local inner city residents. It was concluded in the Report that the objectives of the garden festivals have been a mixture of long and short-term aims, but there is little concern at who benefits from these (O'Toole and Robinson, 1990).

In fact, tangible benefits to the local community, both long and short-term, have been disappointing. The festivals have been developed in an isolated way and there is a need to fully integrate community interests with a broader remit which places community benefit at the top of the agenda.

A report commissioned by the D.o.E. in 1987 entitled 'An Evaluation of Garden Festivals' provides an evaluation of the first three festivals. It is based on three individual studies, with the main report attempting to compare and contrast the evidence. This represents an attempt by the Government to evaluate the garden festival in Britain in terms of cost effectiveness and achievement of objectives. Environmental and social considerations are included in the study, but the emphasis is distinctly on economic benefits (Porter, 1990).
An attempt was made to estimate the gross effects of each garden festival in their local areas and regions and then compare these with estimates of what would have happened had the garden festival not been staged. Environmental and economic benefits were considered, some of these were quantifiable, others were based on value judgements.

Most of the benefits attributed to the Liverpool Garden Festival, were considered environmental and short term. At Stoke the major benefits were associated with the after-use of the site and were economic and long-term in character. Glasgow Garden Festival showed short-term environmental and economic benefits and potential for long-term benefits. It was considered that the festival concept has become more effective over time in that the latter festivals had benefitted from their predecessors. The overall impression was that:

"Garden festivals have yielded a wide range of benefits but many individually are quite modest, given total costs" (PA Cambridge Economic Consultants, 1990).

In the overview, it was stated that in terms of total benefits, a unified measure was not available. It suggested that the short-term and more direct benefits were fairly modest, but span a wider range than would normally have been the case. The view formed was that the festivals had achieved benefits at some net cost and had worked in different ways. It was concluded that:

"...a garden festival may not in isolation be a powerful instrument, but a festival does provide a valuable additional instrument to be included in a regeneration strategy." (PA Cambridge Economic Consultants, 1990).

GARDEN FESTIVAL WALES 1992

In 1984, when sites in Glasgow and Gateshead were selected, the decision was also taken to stage the fifth garden festival in South Wales. As with the allocation of former sites, many areas in South Wales were suffering as a result of the decline in the once dominant
heavy industries. Urban renewal schemes such as the revitalisation of Cardiff Bay and the Maritime Quarter of Swansea represented active efforts in the major centres of South Wales to counteract the consequential problems of industrial decline.

There was evidence of serious economic, environmental and social problems within the Valleys of South Wales. This manifested itself in high unemployment and large expanses of derelict land in areas of Gwent, Mid, South and West Glamorgan (Figure 1.4). Housing conditions were a particular problem. In 1985, 16.4 per cent of houses in the Cynon Valley were classified as unfit to live in because of a lack of basic amenities. Almost 10 per cent of Mid-Glamorgan houses fell into the same category and 15.3 per cent of houses in the Rhondda Valley were condemned (Williams, 1990).

In 1983, the Chief Planner of Blaenau Gwent Borough Council (B.G.B.C.) Lyn Powell produced a 'Statement of Interest in the National Garden Festival 1989'. In 1985, this was followed by the initial bid to host the 1992 National Garden Festival. The proposed site was in the urban district of Ebbw Vale. Ebbw Vale is located at the head of the Ebbw Fawr Valley, 20 miles north of Newport (Figure 1.5). The Borough was suffering many problems and was in the highest category of regional assistance (B.G.B.C., 1985). It was recognised by the European Economic Community (E.E.C.) as qualifying for support under the European Regional Development Fund. The Borough was granted designated district status under the Inner Urban Areas Act (1978) and was therefore able to utilise the urban programme particularly the Urban Development Grant Scheme.
FIGURE 1.4 Wales - Counties and Districts
FIGURE 1.5 Location of Ebbw Vale
The population of the Borough had been in decline for many decades (Figure 1.6). Between 1921 and 1981, the population of the area had diminished by 37 per cent (B.G.B.C., 1985). The area was traditionally dependent on the coal, steel and iron industries, a consequence of this activity was a poor quality physical environment. Evans (1988) states:

"I never really thought about why the River Ebbw ran red with effluent, or about the ugliness of the great heaps of spoil that fouled the valley. The steelworks was an environmental disaster ..."

Such pollution contributed to the low image associated with the Borough.

HISTORICAL BACKGROUND

Before the 1780's, when the first iron furnace was constructed, Ebbw Vale was a series of scattered upland farms. Most of the land was owned by the Duke of Beaufort. As the furnaces were erected, the workforce increased steadily and housing was built around their workplace. In the 1850's, the railway was extended to Ebbw Vale and consequently there was greater output from the works. The population increased with the arrival of incoming migrants. Townships developed at Beaufort, Briey Hill and Willowtown. Ebbw Vale continued to expand. This was sustained by the application of
deep mining techniques to the seams of coking coal below the valley floor. The Waunllywyd Colliery around which the township of Waunllywyd was formed, was sunk in 1874. On the Western side of the valley, the Victoria Ironworks and Colliery were built, and the Victoria township established. In 1889, the Marine Colliery was opened and the settlement of Cwm developed.

The First World War resulted in an increased demand for coal and steel and Ebbw Vale thrived. However, after 1921 a combination of the post-war trade recession and industrial disputes led to a steady decline in activity at the steelworks and the collieries. By 1929, the steelworks closed, unemployment rose to 35 per cent and there was outmigration of the population (B.G.B.C., 1985). This recession continued into the 1930's before an early governmental attempt was made to create employment in a depressed region, by opening a new integrated steelworks at Ebbw Vale in 1938. The Second World War stimulated demand for primary products and this sustained employment throughout the 1940's. During the 1950's and 1960's employment in the area remained stable with over 10,000 people employed locally in the coal industry and a total of 8,900 in the iron and steel industries.

Gradually, there was a move in the U.K. economy away from heavy industry to light industrial development and the demand for steel and coal fell. In 1973, a number of collieries closed and the workforce was reduced to 3,600. With further closures, only 2,700 were employed in the coal industry by 1985 (B.G.B.C., 1985). Today, there are no working collieries remaining in Blaenau Gwent. The British Steel Corporation (B.S.C.) closed the furnaces and steel making plants at Ebbw Vale in 1978 and over the next 5 years they were demolished. This left the B.S.C. Tinplate Works which employed around 2,100 people in 1988 (Martin, Prescott and Leverton, 1988). As a result of the demolition, large areas of industrial land were left to deteriorate.
The fluctuation in fortune of this area was summarised by the former Works Manager of B.S.C. Tinplate, Henry Ball (1985):

"I have worked in Ebbw Vale for twelve years, and it is impossible not to be aware of the depth of industrial history in this community. Although its history is short it has been a microcosm of the total Industrial Revolution experiencing all the successes and failures of the tortuous years of development."

The unemployment rate in the Upper Valleys of Gwent and Mid-Glamorgan (Blaenau Gwent, Merthyr and Rhumney) increased (Figure 1.7). Efforts were made to reconstruct the economic base in Blaenau Gwent through alternative forms of employment (Martin, Prescott & Leverton, 1988). However, at the time of the National Garden Festival bid in 1986, unemployment levels in the Borough were at 18.4 per cent, compared with the unadjusted jobless rate for Wales of 14.8 per cent (Welsh Office, 1993).

**Figure 1.7** Unemployment Rate for Blaenau Gwent in Comparison to Wales, 1984 - 1991 (Welsh Office, 1993)
In June 1988, Peter Walker as Secretary of State for Wales launched the Valleys' Initiative. This three year programme was aimed at tackling the full range of problems found in the Valleys. Two million pounds of public funds were made available for investment. The funds were to be allocated to schemes committed to industrial and commercial expansion, urban development and renewal, housing, education, tourism and the arts (Martin, Prescott and Leverton, 1988). Projects relating to those schemes were designed to encourage co-operation between central government and its agencies, local authorities and the private sector, in order to attract private sector investment. In 1989, the 'Valleys Initiative' was extended to a five year programme under the remit of the new Welsh Secretary, David Hunt.

TOURISM DEVELOPMENT

In 1984, the Wales Tourist Board (W.T.B.) commissioned a report, 'Realising the Potential of the South Wales Valleys.' This was the first comprehensive assessment of tourism potential in the area. It was followed by 'The South Wales Valleys ; an Agenda for Action,' a report published by the Institute of Welsh Affairs in January 1988. This included recommendations in general terms for tourism development in these areas. Key themes to be developed included 'heritage' and 'the Valleys.' The development of a 'Valley Gateway' concept was proposed. This would link towns and existing tourist attractions to form the basis of a day-visit or a short-break.

By the late 1980's, considerable tourism development involving local authorities and government agencies in leisure provision and environmental improvement had taken place in the Valleys. Projects included Bryn Bach Country Park, Rhymney, Tredegar Park, Newport, Big Pit Mining Museum, Blaenafon, Pontypridd Historical and Cultural Centre and the Rhondda Heritage Park (Rees, 1988) (Figure 1.8).

Guidelines for development in Wales over a five year period ending in 1992 were proposed in the W.T.B. Strategy of 1988. The importance of tourism to the Welsh economy was outlined. In 1986, the revenue to Wales from tourism was £600 million. This included an estimated
FIGURE 1.8 Wales - Tourism 1991
FIGURE 1.9 Expenditure by British and Overseas Tourists in 1986 (W.T.B., 1988)
<table>
<thead>
<tr>
<th>Purpose</th>
<th>GB %</th>
<th></th>
<th>ENGLAND %</th>
<th></th>
<th>WALES %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday solely</td>
<td>36</td>
<td>52</td>
<td>50</td>
<td>35</td>
<td>50</td>
</tr>
<tr>
<td>Holiday VFR</td>
<td>19</td>
<td>18</td>
<td>9</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>VFR solely</td>
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<td>23</td>
<td>16</td>
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<td>11</td>
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<td>4</td>
<td>3</td>
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<tr>
<td></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

**TABLE 1.1**  Tourism by British Residents Within Britain - Purpose of Visit, 1986
(W.T.B., 1988)
£500 million from the 12 million British residents who took a holiday, had an overnight business trip or stayed with friends and relatives in Wales, during the year. The remaining £100 million was attributable to the 520,000 overseas visitors to Wales (Figure 1.9). Expenditure by day visitors was estimated at an additional £300 million.

In 1986, travel for holiday purposes formed the major component of domestic tourism to Wales, accounting for 67 per cent of all trips, 79 per cent of all nights and 72 per cent of all expenditure (Table 1.1). The market share of the overseas visitor market was very low accounting for only 3 per cent of all trips to the U.K. and even less in terms of expenditure (Table 1.2). In terms of market share, 9 per cent of all tourism trips and 12 per cent of nights by domestic visitors were to Wales (Table 1.3), a market share which was only exceeded by the West Country, England.

<table>
<thead>
<tr>
<th>TRIPS</th>
<th>NIGHTS</th>
<th>EXPENDITURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume</td>
<td>% of UK</td>
<td>Volume</td>
</tr>
<tr>
<td>All overseas visitors</td>
<td>520,000</td>
<td>3%</td>
</tr>
</tbody>
</table>

**TABLE 1.2** Wales' Share of the Overseas Visitor Market, 1986
(W.T.B., 1988)

<table>
<thead>
<tr>
<th>TRIPS</th>
<th>NIGHTS</th>
<th>EXPENDITURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume</td>
<td>% of UK</td>
<td>Volume</td>
</tr>
<tr>
<td>All tourism</td>
<td>12 m</td>
<td>9%</td>
</tr>
<tr>
<td>Holiday tourism</td>
<td>8 m</td>
<td>11%</td>
</tr>
</tbody>
</table>

**TABLE 1.3** Wales' Share of the British Tourism Market, 1986
(W.T.B., 1988)
Table 1.4 shows the accommodation stock in Wales in 1986. Serviced accommodation represented a third of the bedspaces in Wales, though the sector accounted for approximately half of the total expenditure of staying visitors from Britain and abroad. It was estimated by the W.T.B. (1988) that the licensed hotel sector, with 48,000 bedspaces, generated 36 per cent of the expenditure, around £170 million. The distribution of accommodation by county in relation to population in 1986 is represented in Figure 1.10 Glamorgan and Gwent had approximately 62 per cent of the population, but only 13 per cent of Wales’ accommodation for tourism.

<table>
<thead>
<tr>
<th></th>
<th>BEDSPACES</th>
<th>SHARE OF EXPENDITURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serviced accommodation</td>
<td>76,000 (31%)</td>
<td>51%</td>
</tr>
<tr>
<td>Self-catering (non caravans)</td>
<td>52,000 (21%)</td>
<td>15%</td>
</tr>
<tr>
<td>Caravans and camping</td>
<td>116,000 (48%)</td>
<td>34%</td>
</tr>
</tbody>
</table>

**TABLE 1.4** Wales’ Accommodation Stock and the Expenditure Generated, 1986. (W.T.B., 1988)

**FIGURE 1.10** The Distribution of Accommodation in Relation to Population in Wales by County, 1980 - 1986 (W.T.B., 1988)
The W.T.B. estimated that in 1988 some 90,000 full time equivalent jobs were sustained directly or indirectly through tourism, representing between 7 and 8 per cent of the total labour force. This was more than double the combined direct employment in the coal and steel industries.

It was stated in the W.T.B. Strategy (1988) that Wales was relatively dependent on the declining main seaside holiday market. However, this market was being eroded by 'import substitution' represented by holidays abroad in sunshine destinations. It was anticipated that between 1978 and 1988 Wales lost 1 million holidays of 4 or more nights from within Britain.

A review of the comparative strengths and weaknesses of tourism resources in Wales was included in the Strategy to establish development priorities for that time. An image problem of the South Wales Valleys and the perception of unsightliness among its markets were identified. The W.T.B. recognised that a garden festival in South Wales provided an opportunity to attract a large number of new visitors into a part of Wales where tourism was a part of the regeneration process. A festival was considered to be an opportunity to alleviate negative perceptions of the area and encourage repeat visits to South Wales in the future.

THE BID FOR GARDEN FESTIVAL WALES 1992

It was within this context that Gwent County Council (G.C.C.) and Blaenau Gwent Borough Council (B.G.B.C.) established a special committee to pursue the bid to host the fifth National Garden Festival in Ebbw Vale. The arguments put forward capitalised on the severe problems in the area and the potential of a festival to accelerate environmental improvement and economic regeneration in the Blaenau Gwent Borough and the South Wales Valleys. Outlined in the bid were the opportunities afforded by a valley setting for a "fundamentally different" event and its potential to attract visitors who would not otherwise come (B.G.B.C., 1986). In March 1986, the bid was shortlisted with three other proposals from Cardiff, Swansea and Shotton in Clwyd (Buckingham, 1987).
The Secretary of State for Wales Nicholas Edwards, awarded Ebbw Vale the franchise to stage the 1992 Festival. He told the two Councils:

"The site is one of classic industrial dereliction, but at the same time presents a particularly dramatic setting for the festival. It is a highly ambitious project which, if it fulfils its promise, will give a real boost not just to Ebbw Vale and its neighbours, but will be of wider benefit to the whole of Wales." (Evans, 1988)

Garden Festival Wales was a project to be funded by both the public and private sectors. B.G.B.C. and G.C.C. were the sponsoring authorities with Central Government providing support through the Welsh Office. The Welsh Development Agency (W.D.A.) and the W.T.B. were also key partners. A significant advantage to the festival was that it was organised under the umbrella of the Valleys Initiative and this, in itself improved the longer-term prospects of the site from the outset.

A feasibility study on the reclamation of the site had already been undertaken in 1980 (B.G.B.C., 1985). The site at Victoria Heights was 2 miles in length and located just south of Ebbw Vale. The total area was 135 hectares (N.G.F. Ltd., 1987). The derelict land was situated at the lower contours of Y Domen Fawr with the topography of the site varying from 223 metres to 381 metres above sea level (Cooper, 1991). It comprised two distinct but linked sections of the former Ebbw Vale Steelworks, a large area of which had been subject to slag-dumping and metallic recovery operations. The primary land owner was the B.S.C., although a significant proportion was owned by B.G.B.C. British Rail and other private interests were also involved to a lesser extent (B.G.B.C., 1983).

LAND RECLAMATION

The reclamation scheme was wholly funded and managed by the W.D.A. who were able to begin the £22.5 million reclamation process in January 1987 (Thomas, 1993). Four contracts started on site, two for site investigation and two for advanced planting. These early contracts were overlapped by the main reclamation contract valued at
more than £10 million (Poller, 1991) and a £2 million contract for strengthening a river culvert running 25 metres underneath the main part of the site from the River Ebbw. Principal engineering works involved regrading the slag tip, provision of festival car parking, capping a number of mineshafts, construction of a new road, the festival landforms and lake and the rearrangement of active rail marshalling areas (Blunt, 1987).

Two million cubic metres of earth and industrial spoil had to be shifted and reprieved. Soil ameliorants were used in vast quantities, and top soil was imported from local sources to rejuvenate the ground. The site had no substantial vegetation so it was essential that planting had maximum establishment time prior to the festival. One and a half million trees and shrubs were planted consisting of mixtures designed for rapid screening, colourful shrub cover, woodland development and exposure tolerance. The reafforestation of the site with indigenous species such as ash, alder, cherry and mountain ash was up to 90 per cent successful. (Cooper, 1991). Completion of the reclamation scheme was programmed for April 1989. However, a number of problems delayed the process and the reclaimed site was officially handed over to the Garden Festival Company in November 1989 (Poller, 1991).

GARDEN FESTIVAL WALES LIMITED

In 1987, '1992 National Garden Festival Limited' (later Garden Festival Wales Limited) was established. This took the same form as previous Festival Companies. The Company Board consisted of four representatives from each Council and five representatives from the private sector. The Chairman, Philip Weekes, was ex-Director of the National Coal Board, South Wales. The Chief Executive, Lyn Powell, was seconded from B.G.B.C. When the W.D.A. handed over the reclaimed site, this position was taken by Bob Webb. Directors were also appointed for Finance, Marketing, Operations and Project Management (G.F.W. Ltd., 1990). Initially, the Company headquarters were set up in a temporary unit overlooking the site at Victoria Heights; company personnel were later housed in a purpose-built unit on the festival site.
On the basis of the proposals put forward in the bid, the Company’s stated objectives were to design, construct, market and operate the 1992 National Garden Festival that would attract at least 2,000,000 visitors and generate operating receipts of at least £11.2 million. G.F.W. Ltd. aimed to maximise private investment within the site and attract at least £3.5 million in commercial sponsorship, achieving an overall net project surplus. The festival was to provide an exciting day out for the whole family while establishing a recognised level of horticultural excellence. In the long-term, the festival would project a new image for the Valleys thereby acting as a primer for the creation of economic wealth and job opportunities (N.G.F. Ltd., 1987).

It was intended that Garden Festival Wales should meet all of the basic parameters for a garden festival as stated by the D.o.E. However, emphasis was placed on improving the image of the area by means of environmental improvement and using the festival as a focal point to increase awareness. In turn, this would bring about more rapid regeneration and a wider economic base than would have been achieved otherwise. Philip Weekes stated:

"Ebbw Vale will change people’s attitude to South Wales. They will see the valleys as they really are, pleasant places to live in and to visit, rather than the strife-ridden, coal-blackened disaster areas of popular mythology." (Smith, 1992).

THE MARKETING APPROACH

The semi-rural valley location offered the benefits of a dramatic setting for the event, but the greater distance from large centres of population in comparison to previous festivals placed more importance on integrated and effective marketing. Victoria Heights is approximately 20 miles north of Newport and the M4 motorway. Three miles north of the site lies the Heads of the Valleys Trunk Road. This provides direct dual carriageway and motorway access to Swansea to the west and the Midlands to the east. In 1989, within the catchment area of one hour’s driving distance from the site, was a combined population of 2,400,000 which included that of the major centres of Newport, Cardiff, Swansea, Bristol and Gloucester. Within an additional half
hours driving distance, the catchment population extended to 4,000,000 with the inclusion of Birmingham, Swindon, Cheltenham and Llanelli. The site is approximately 1 hour’s driving distance from Cardiff Wales Regional Airport. There was a rail head within the site, with a freight only link to Newport (B.G.B.C., 1983). Negotiations between G.F.W. Ltd. and British Rail to introduce a rail passenger service failed. Consequently the only means of access to the site, for festival purposes, was by road.

To meet their objectives the Company intended to pursue a 'market-led' rather than a 'design-led' strategy. This would necessitate identifying the wants, needs and desires of potential visitors. In 1989, a marketing plan was prepared; this was amended in 1990. The market research for this Plan included utilisation of the N.O.P. exit polls undertaken at Liverpool and Stoke Garden Festivals. The Company decided to lower the age profile of the target market and focus their efforts on attracting younger groups such as schools in addition to middle to upper income families with greater spending propensity.

In comparison to previous festival sites, it was essential that Ebbw Vale attracted long distance visits and encouraged repeat visits. In order to achieve their aim of 2,000,000 visits, it was anticipated that 100,000 of these would be educational visits. In terms of drive time to Ebbw Vale, 440,000 visitors were expected to travel for less than one hour, 960,000 visitors were expected to travel between one and three hours and 475,000 for more than three hours. It was anticipated that between 330,000 and 500,000 visits would be made by domestic tourists (staying visitors); 25,000 visitors were expected from overseas (Figure 1.11).

Access to Ebbw Vale, the target markets specified in the marketing plan, the proximity of traditional holiday areas and the social characteristics of the resident population were all key factors which influenced product decisions. In terms of marketing G.F.W. Ltd. identified the following market perception problems: the conception of distance to Ebbw Vale on the part of potential visitors from Cardiff, Bristol, the Midlands and the South East; the concept of the 'garden
festival' and the need for broader appeal; convincing the visitor that the Valleys were a tourist destination; the lack of an easily definable image for South Wales in the rest of Great Britain; and the high level of perceived competition from alternative attractions.

In order to reach the target markets and attempt to overcome some of the perceptual problems, G.F.W. Ltd. undertook an intensive promotional programme. The Festival Company had a promotional budget of £7.7 million. This consisted of the Garden Festival Wales marketing budget of £3.4 million, W.T.B. support of £3.3 million and co-advertising and promotions with the media, sponsors, carriers and operators to the value of £1 million (G.F.W. Ltd., 1990). Collaboration with the latter formed a significant part of the Festival’s strategy in reaching diverse markets.

A Welsh advertising agency, Golley Slater and Partners Limited, was commissioned by the Festival Company. The Agency considered the target penetration potential from within each of the drive-time bands and concluded that it was necessary to exceed the targeted number of visitors from within South Wales, maximise the Midlands potential and create a high penetration of visits from the M4 corridor, Avon and Bristol. A three-phase communications programme was planned, comprising pre-launch (January - December 1991), launch (January - end of May 1992) and post-launch (June - October 1992).

In February 1992, a research proposal to monitor visitor origin and response to Garden Festival Wales was prepared by Golley Slater and Partners Limited. A reporting system and exit survey and schedule were outlined. The proposed exit survey was very similar to those undertaken at previous garden festivals. It was considered necessary to collect visitor information for the purposes of an evaluation of the marketing activity and feedback on customer response to the festival product.

It was necessary to establish an image to convey the 'spirit' of Garden Festival Wales that would attract and impress the target audience. Peter Gill Associates in Cardiff designed a logo which Golley Slater and Partners developed into the character of 'Gryff.' (Figure 1.12). The
FIGURE 1.12  The Garden Festival Wales Logo - 'Gryff'
aim of Gryff was to be a living embodiment of fun and friendliness. The logo was colourful in terms of promotional print and stationery.

Initially, marketing activities focused on public relations aimed at influencing the local community, the consumer and business markets, and both educational and wider political audiences. For the launch period during the autumn of 1991, a nationwide media campaign began. Posters appeared in Wales, the Midlands and London. The television campaign involved HTV Cymro/Wales Ltd. and Central Independent Television plc. Local, national and specialist press were used for branding purposes. This activity intensified into the spring and summer of 1992.

The Festival Company undertook its own extensive promotional print programme. A number of criteria were considered during its preparation. There was a need to achieve awareness of a new product quickly and to create strong branding. Information was required for specific purposes, and rapid penetration among special interest and travel trade groups was essential. In addition to Garden Festival Wales' own print programme, material which featured the festival exclusively or in part was also produced by third parties.

Money was allocated to the travel trade to encourage carriers, tour and coach operators to include entrance to the festival in their inclusive programmes. A secondary aim was to ensure that Garden Festival Wales was mentioned in the text of any Operator's brochure where Wales was part of the programme. U.K. and overseas tour and coach operators, handling agents, airline and ferry companies, British Rail and accommodation providers were targeted using a combination of methods. These included sales visits, direct mail, familiarisation visits, roadshows and attendance at trade fairs and workshops. The main approach to the retail trade was via operators whose commissionable packages included Garden Festival Wales. Special interest groups such as horticultural societies and the education market were dealt with separately.

Particular importance was placed on attracting the education market to the festival. The high-street hamburger chain, McDonald's, committed
£750,000 in support of Garden Festival Wales' Education Strategy. The strategy consisted of 3 main elements. The festival site pre-1992 was used to generate interest, and 48,000 school children went to see the site during the construction phase. Written educational packs were produced, aimed at a 5-14 age range. These were evaluated by the Curriculum Council for Wales and the Welsh Office to establish credibility among the education sector. All schools within a 3 hour drive time of Ebbw Vale were targeted and personal visits were made by G.F.W. Ltd. staff. Schools were encouraged to participate in the events schedule which would take place during the festival. The opportunities created by this campaign were used for wider media purposes, particularly public relations.

Within this marketing framework, the Garden Festival Wales product was developed. Though a preconceived identity had been established by previous garden festivals in Britain, it was a new product which, operating within the physical parameters of the site and the financial limitations of the festival budget, could be tailored to meet customer requirements. From the outset, there was a very strong focus on the customer. This obviously had implications on the site design and there was very close liaison between the Marketing Department and the Project Department.

The contract for the design and construction of the site was to the value of £25 million. This was managed by a core team consisting of representatives for design co-ordination, cost control, construction management, visual arts and horticulture. The overall design co-ordinator was Gillespies; the cost control team was provided by a professional quantity surveying practise, Symonds; and construction management was organised under a contract with Bovis Construction (Ridout, 1991). The visual arts co-ordinator and the horticultural team were predominantly in-house. Once the design masterplan was approved by the Festival Company, the site was divided into eight separate areas and issued to eight consultant design teams. The festival was to adhere to three main themes that traced Welsh history.

Visitor management decisions had to be made in terms of car parking and transportation, signposting and the maximisation of spending.
opportunities through the location of catering and retail outlets. The integration of permanent and temporary buildings, themed areas, special features, exhibits and horticultural displays also had to be planned.

An additional, and very important factor, was the role and impact of sponsors. The sponsorship consultancy, Alan Pascoe Associates was commissioned to work alongside G.F.W. Ltd. and achieve an effective sponsorship target of £3.5 million (G.F.W. Ltd., 1989). There were 120 plots of land or 'voids' on site available for enhanced sponsorship. All of those investing money or goods and services in the festival expected returns and aimed to maintain a high profile during the festival. As in the case with all of the British garden festivals, occasions arose when a sponsor identified a particular location on the site that conflicted with the ideas and concepts of the festival theme (Poller, 1991). In November 1991, the Festival Company had harnessed the support of 60 sponsors from both the public and private sector (G.F.W. Ltd., 1991). This included a number of Local Authorities and household names such as Hoover, British Coal Opencast, British Steel, Glengettie Teas, South Wales Electricity and Cadbury's.

RESEARCH HYPOTHESIS

It would appear from the evidence provided that G.F.W. Ltd. adhered to a 'market-led' strategy in order to achieve the Company objectives and attract a large number of visitors to the festival. Research conducted into the first four garden festivals indicates that objectives regarding short-term benefits have been achieved in each case. It is for this reason it has been assumed that Garden Festival Wales had the potential to attract visitors to South Wales who would not have come otherwise.

A negative image of the South Wales Valleys had been identified as a problem which hindered tourism development as part of the regeneration process. The bid for the 1992 garden festival cited the possible benefits afforded by attracting large numbers of visitors to Ebbw Vale. Opportunities to create awareness among potential markets and to alleviate some of the image problems of the area were
made apparent. In view of the positive tourism impacts attributed to festivals and special events in general, the positive outcomes resulting from previous garden festivals and the endorsement of Garden Festival Wales by the W.T.B., it is postulated that the festival will have a beneficial affect on the local tourism industry.

In order to consider this, the visitor attraction sector of the local tourism industry will be studied. The criteria for assessment are the 'perceived' benefits and 'actual' benefits attributable to Garden Festival Wales. The perceived benefits are the tourism and commercial impacts such as those previously outlined by Van Der Lee and Williams (1986). They include:

- Potential repeat visits to the locality in the future, benefitting local tourist attractions.
- An increased awareness and knowledge of South Wales as a tourism product among potential visitors.
- An improved image of South Wales among actual and potential visitors.
- Positive word-of-mouth recommendation among actual and potential visitors.
- Enhancement of existing Campaigns that aim to encourage visitors to the locality.
- Trained people in tourism and visitor promotion services i.e. positive implications for Operators regarding dissemination of information.

The actual benefits are mainly concerned with the economic impacts of Garden Festival Wales. These have received a great deal more attention in terms of the evaluation of previous garden festivals. Such benefits include:
- Additional visits / increased visitor numbers to the attractions in question.
- Higher expenditure per head.
- Greater coordination between relevant interests in order to maximise the above potential e.g. tourist attractions consortia.
- Encourage Operators to actively market themselves e.g. new approaches, review existing approach.
- Provision of an additional promotional channel by which to target potential visitors.
- Development of a professional tourism network.

As already stated by Ritchie (1984), much less research has been undertaken to assess the perceived benefits attributable to festivals and special events in comparison to the study of actual benefits. Although it is difficult to measure and quantify perceived outcomes it is essential to consider their significance, particularly as aspects of Government objectives for garden festivals and the objectives of individual festivals aim to achieve such benefits. Judging by the example of previous garden festivals it has been assumed that the exit poll to be undertaken for the duration of Garden Festival Wales would form the basis of statements regarding the perceived positive impacts. It is suggested that an independent complementary assessment is required. This study aims to provide that assessment.

It is worthwhile remembering the argument sustained by Ritchie (1984), that there is potential for negative economic, tourism and commercial impacts. The substitution effect as experienced by visitor attractions during the Liverpool and Gateshead festivals are reminders of this and G.F.W. Ltd. acknowledged competition as a possible problem.

The proposed research aims to obtain an overall consensus of the impact of visitors to Garden Festival Wales on other local visitor attractions. The study necessitates the collection and subsequent analysis of three distinct data sets, the collection of which is outlined in the following chapter. The postulated perceived and actual benefits are the criteria which form the parameters of the proposed research. The impact will be judged using a method of triangulation which
combines the perceptions of the 'professional host' ie. the managers of the local visitor attractions with an investigation of the attitudes and opinions of visitors to those attractions. A unified evaluation of this primary data and the relevant secondary data aims to test the validity of the stated hypothesis:

"GARDEN FESTIVAL WALES AND THE INCREASED VISITOR NUMBERS ATTRIBUTABLE TO THE EVENT, HAD A BENEFICIAL AFFECT ON OTHER PERMANENT LOCAL VISITOR ATTRACTIONS."
CHAPTER 2.

METHODOLOGY

"Practise what you know and it will help you discover what you do not know."

(Rembrandt)
The research design was determined by the practicalities of the research objectives. It was necessary to select the most appropriate research instruments from an operational standpoint to obtain evidence that would test the validity of the stated hypothesis. A multiple research approach has been adopted which involves three data-collection methods and has resulted in three data sets. Two of these data-sets consist of direct data i.e. that obtained by primary research techniques, designed specifically to obtain information for the purposes of the study. The third data-set was derived from indirect sources i.e. secondary sources composed of information and statistics compiled by various public and private organisations (Figure 2.1).

Problems inherent to the research were anticipated. It was recognised that there would be difficulties in relating any measured changes in visitor patterns at the visitor attractions to Garden Festival Wales. Each attraction operated under a variety of circumstances and would be influenced by external variables. The perceived benefits, an integral part of the research criteria, were intangible and therefore would be difficult to assess in quantitative terms. They were also susceptible to other external influences which may have been unrelated to Garden Festival Wales. These problems were identified beforehand to ensure that they were accounted for in the research design.

**THE VISITOR ATTRACTION SAMPLE**

The sample selected for the study consisted of sixteen, managed visitor attractions. The resources on each site which provide the 'visitor experience' could be classified in a number of ways. For the purposes of this research the visitor attractions were categorised according to groupings used by the W.T.B. (1992). The sample comprised six historic properties, five museums and art galleries, three industrial and craft attractions and two countryside attractions (Table 2.1). Five of the attractions were owned and managed by Cadw (Welsh Historic Monuments), eight by Local Authorities, two by the Forest Enterprise in Wales and one by the National Museum of Wales (N.M.W.) (Table 2.2). Of the sixteen attractions, eight were members of Gwent Association of Tourist Attractions (G.A.T.A.) (Table 2.3). It was
FIGURE 2.1  The Data Sources
<table>
<thead>
<tr>
<th>CATEGORY OF RESOURCE</th>
<th>ATTRACTIONS IN THE SAMPLE</th>
<th>CATEGORY TARGET PERCENTAGE OF FINAL QUOTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>HISTORIC PROPERTIES</td>
<td>Caerphilly Castle</td>
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</tr>
<tr>
<td></td>
<td>Raglan Castle</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tretower Castle &amp; Court</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Castell Coch</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tredegar House</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Caerleon Roman Baths &amp; Amphitheatre</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>36.7</td>
</tr>
<tr>
<td>MUSEUMS &amp; ART GALLERIES</td>
<td>Abergavenny Castle &amp; Museum</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Caerleon Roman Legionary Museum</td>
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<tr>
<td></td>
<td>Pontypridd Historical &amp; Cultural Centre</td>
<td></td>
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<tr>
<td></td>
<td>Cyfarthfa Castle Museum &amp; Art Gallery</td>
<td></td>
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<td></td>
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<td></td>
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<td>Rhondda Heritage Park</td>
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<td>COUNTRYSIDE ATTRACTIONS</td>
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<td></td>
<td>Cwmcarn Scenic Forest Drive</td>
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<td></td>
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<td>14.3</td>
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</tbody>
</table>

**TABLE 2.1** The Visitor Attraction Sample: Categorisation of the Resource
<table>
<thead>
<tr>
<th>CONTROLLING ORGANISATION</th>
<th>ATTRACTIONS IN THE SAMPLE</th>
<th>CATEGORY TARGET PERCENTAGE OF FINAL QUOTA</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL AUTHORITIES</td>
<td>Newport Museum &amp; Art Gallery&lt;br&gt;Tredegar House&lt;br&gt;Big Pit Mining Museum&lt;br&gt;Pontypridd Historical &amp; Cultural Centre&lt;br&gt;Rhondda Heritage Park&lt;br&gt;Llancaiach Fawr&lt;br&gt;Cyfarthfa Castle Museum &amp; Art Gallery&lt;br&gt;Abergavenny Castle &amp; Museum</td>
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<tr>
<td>CADW ( Welsh Historic Monuments)</td>
<td>Caerphilly Castle&lt;br&gt;Raglan Castle&lt;br&gt;Tretower Castle and Court&lt;br&gt;Caerleon Roman Baths &amp; Amphitheatre&lt;br&gt;Castell Coch</td>
<td>34.1</td>
</tr>
<tr>
<td>FOREST ENTERPRISE IN WALES</td>
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</tr>
<tr>
<td>NATIONAL MUSEUM OF WALES</td>
<td>Caerleon Roman Legionary Museum</td>
<td>4.4</td>
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</tbody>
</table>

**TABLE 2.2** The Visitor Attraction Sample: Ownership and Management
<table>
<thead>
<tr>
<th>G.A.T.A ATTRACTIONS IN THE SAMPLE</th>
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<tbody>
<tr>
<td>Raglan Castle</td>
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<td>Abergavenny Castle &amp; Museum</td>
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<td>Big Pit Mining Museum</td>
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<td>Caerleon Roman Legionary Museum</td>
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<td>Caerleon Roman Baths &amp; Amphitheatre</td>
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<tr>
<td>Newport Museum &amp; Art Gallery</td>
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<tr>
<td>Tredegar House</td>
</tr>
</tbody>
</table>

**TABLE 2.3**  G.A.T.A. Members Included in the Visitor Attraction Sample
important that the visitor attractions were collectively representative of the sector and that variables such as resource type, size and ownership were considered in the study.

Conditions were applied to the selection process. First, the attraction had to be located within a 25 km radius of the Garden Festival Wales site (Figure 2.2). As a consequence of their proximity to Ebbw Vale the potential implications of Garden Festival Wales had more relevance to such attractions. Second, the attraction had to be listed in the 1992 W.T.B. Research Information Factsheet which reported statistics compiled from annual returns made by individual operators of visitor attractions in Wales. This ensured that the attraction had a reasonable basis for recording attendance and allowed for a comparison between official visitor figures for 1991 and 1992. Third, it was necessary to ensure that the attraction received an adequate number of visitors in 1991 so that the visitor sample at that attraction would be significant and valid. The 1992 W.T.B. Factsheet provided the sampling frame and the specified criteria determined the sample size.

Prior to the field research, an introductory letter was sent to the manager of each attraction. This letter introduced and outlined the study, detailed why the attraction had been included in the sample and requested the cooperation of the manager. A letter was sent to 17 visitor attractions. Sixteen managers responded positively to this granting permission to allow interviewing of visitors on-site and agreeing to take part in a face-to-face interview. The manager of one visitor attraction did not wish to be included in the research. Introductory letters were also sent to the relevant 'umbrella' organisations ie. the Wales Tourist Board, Cadw, Forest Enterprise in Wales, the National Museum of Wales and six local authorities.

THE VISITOR SURVEY

The visitor survey was carried out during the operational period of Garden Festival Wales ie. May - October 1992, and involved the use of a standardised questionnaire to interview visitors on-site. It was essential that the questionnaire was user-friendly and that it would allow the interviewer to obtain and record accurately, the information
specified by the research criteria. These were the fundamental principles behind the questionnaire design.

A 20 per cent quota sample of the average 1991 daily visitor figure was the target figure for each attraction for each month of the survey. The translation of this percentage into visitor numbers for each attraction is shown in Figure 2.3. A total target of 427 respondents per month resulted in an overall target of 2,135 over the 5 months of Garden Festival Wales’ operation.

The Pilot Sample

The draft questionnaire was piloted at one of the attractions during May. After evaluating this pilot-study, it was considered that the research requirements of the visitor survey were fully satisfied by the questionnaire design. Only minor alterations involving extension of the options for pre-coded questions were necessary. During the pilot-study such amendments were added instantly to the questionnaire. As this data was obtained in a manner consistent with the final survey the data obtained from the pilot sample has been included in the ultimate data-set.

The Questionnaire

The questionnaire (Appendix 1.) which formed the basis of the face-to-face, fully-structured, brief interview with the respondent consisted of 25 succinct items. It was designed to collect information regarding the demographic profile of the visitor, type of visitor, catchment area and mode of transport, length of stay, how the visitor learned of the attraction, awareness and perception of Garden Festival Wales. One question was open-ended, the remainder were pre-coded/fixed choice questions. Show cards were used for some questions.

In addition to this information it was necessary to include reference information by which individual questionnaires could be checked. The main reference questions were included at the beginning of the questionnaire, followed by classification, behavioural, attitudinal and then profile questions consisting of personal and demographic
FIGURE 2.3  Quota of Visitors to be Interviewed at Each Attraction During the Survey Period
characteristics. It was necessary to ask respondents to predict their own behaviour and it is acknowledged that respondents' statements of intent may not have been borne out in reality. Questions were grouped and introduced by a main 'filter' question to determine whether subsequent or 'dependent' questions were relevant. If terms were not self explicit, they were defined. In order to tabulate the results it was possible to categorise and code all answers.

Implementation

Implementation of the visitor survey involved the assistance of a team of 6 volunteer interviewers. A non-probability sampling approach was adopted. A quota sample was obtained based on the 1991 visitor figures available for each attraction (W.T.B., 1992). Additional information regarding visitor characteristics and behaviour patterns was not available, hence a stratified sampling approach was not possible. The quota sampling method ensured that ultimately a significant sample size representative of visitor volumes of the attractions sample would be obtained. The representativeness of each individual site quota may be less rigorous as it was necessary to forgo too much control over the time of interview and selection of the respondent in order to ensure the collection of the quota. Interviewers aimed to collect data for each attraction in a single visit during the month, however to obtain the required quota it was often necessary to visit on more than one occasion. This was due to a large sample size at some attractions and external variables such as the weather affecting visitor numbers. At certain attractions part of the visitor experience was a guided tour which did not allow for a steady or constant flow of visitors, and times of over-capacity for the interviewers were followed by periods of idle time.

On completion of the visitor survey 2,121 questionnaires were useable. This figure provides the base figure for the visitor survey. The day and time of interview for each attraction over the sampling period is shown by Figure 2.4 and Figure 2.5 respectively. The weather at the time of interview is depicted in Figure 2.6.
FIGURE 2.4  Visitor Survey - Day of Interview
FIGURE 2.5  Visitor Survey - Time of Day of Interview

FIGURE 2.6  Visitor Survey - Weather at Time of Interview
THE HOST SURVEY

The host survey involved structured, recorded interviews with the managers of the sample visitor attractions. These interviews were carried out during December 1991 to January 1992, after the closure of the festival. This qualitative aspect of the data collection programme was designed to uncover the opinions, perceptions, impressions, reasons, ideas and motivations that these individuals had about Garden Festival Wales. Each attraction was operating under different circumstances and a number of variables were present. To gather the requisite information it was necessary to talk at length, with each professional host and allow for a broad range of opinions and insights to be expressed. These data are used to address a number of criteria in the research.

The professional host was selected in a purposive process to ensure that they were relevant to the study. By the nature of their profession it was expected that the managers of the visitor attractions would have an understanding of the tourism industry and product in South Wales, a knowledge of the nature of tourist activity and development in the area, and access to information regarding visitor characteristics and marketing techniques for their attraction. This specialist information was necessary for the purpose of the research.

The Interview Schedule

The same set of issues adhering to the research criteria had to be covered in all the interviews. To facilitate this an interview schedule (Appendix 2.) was produced that was open-ended and flexible but followed an established framework. The interview schedule was divided to two main parts. Part 1. determined any significant changes in the number or type of visitor to the attraction and if so, the factors responsible for this and the relevance of Garden Festival Wales. Part 2. of the interview was concerned with the evaluation of Garden Festival Wales in terms of its contribution to the local tourism product ie. the involvement of the respondent with the festival, the image portrayed by the festival, the impact on market awareness of Wales and the distribution of the associated costs/benefits of the festival.
Key questions were supported by prompter words and phrases, aimed at maximising the information volunteered by the interviewee. This involved careful assessment of all the issues likely to arise in the conversation and listing the possible 'probe' questions.

To motivate a reluctant interviewee to become more expansive, the question sequencing went from the specific to the general. The questions sought responses in terms of description and awareness to affective, behavioural and attitudinal.

Implementation

Each interview was recorded onto tape by means of a battery-powered audio-tutor. In the immediate post-interview process, notes were made regarding the interview setting, any problems encountered, behavioural and non-verbal cues. Recording the interview ensured accuracy in transcribing the conversation and eliminated selective perception from the process. However, there were disadvantages with this method. First, uncertainty as to the length of time each individual interview would take created problems regarding the capacity of the equipment. Second, background noise was undesirable and in such instances clarification of certain points was essential. The recording process inhibited certain individuals and thus less information was obtained, however it encouraged other interviewees to think about their responses, thus encouraging more effective communication.

The qualitative interview format afforded greater flexibility and could be tailored to the differing circumstances of interviewees. It lessened the chance of misunderstanding as there was scope for clarification and in-depth inquiry. The use of this technique made it possible to gain interview data that portrayed issues and themes at the core of the analysis. Overall, the advantages outweighed the disadvantages and the research instruments were satisfactory.

On completion of the 16 scheduled interviews, it was evident that some information gaps existed. This was the result of certain interviewees not having access to the requisite information. To gain this information a further 3 interviews with representatives of the
relevant 'umbrella' organisations ie. the National Museum of Wales, Cadw and the Forest Enterprise in Wales, were carried out. It was considered that these 3 additional interviews completed the data-set. The transcriptions of the 19 interviews varied widely in volume, but even the smallest provided sufficient evidence to progress.

SECONDARY DATA COLLECTION

The secondary data collection programme involved gathering relevant tourism statistics, regarding numbers and trends, over the full period of the study. This included visitor admissions and occupancy figures to tourist attractions and amenities. The nature of the information utilised includes longitudinal data ie. obtained from statistics gathered on an ongoing basis and studies undertaken on a cross-sectional basis. A large number of organisations are involved with the tourism industry and the indirect data was extensive. There was a rigorous element of selection to ensure that the data was relevant to the research question.

PRE-ANALYSIS

Preceeding the analysis of the three data-sets, the data derived from the visitor survey has been analysed using the statistical software package 'Minitab (P.C. Version)'. This package has the storage capacity to cope with the large data-set and allows for vast possibilities regarding data manipulation ie. from the quantification of basic results, to cross-tabulations and more complicated statistical analysis. Data obtained by the qualitative interview has been analysed by a mechanical process which involved grouping the data into common sets. Analysis across all of the derived data has allowed scope for establishing a range of generality to the findings and the consideration of a greater number of variables. It was considered that the triangulation of methods enhanced the reliability of the research results.
For reporting purposes, the results have been aggregated into two sections relating to the visitor and host surveys. The software packages 'Microsoft Excel, Version 3.0' and 'Microsoft Draw, Version 1.0' have been used for the graphics presentation.
CHAPTER 3.

VISITOR SURVEY RESULTS

"By knowing things that exist, you can know that which does not exist."

(Miyamoto Musashi)
The visitor survey provided 2,121 useable questionnaires. Male (1,060) and female (1,061) respondents were equally represented. The age distribution of the sample is shown in Figure 3.1. The females in the sample population are slightly younger than their male counterparts. When compared to 1981 census figures for the U.K. resident population (C.S.O., 1993), the age distribution of adult male respondents is skewed towards the older age categories. The mean age of the adult female respondent is less than that for the 1981 census.

![Figure 3.1: The Age Distribution of the Sample Population](image)

The Market Research Society classification of social groupings provides the basis for the categorisation of respondents. A 'miscellaneous' group has been added to include those respondents who quoted themselves as 'housewives,' or 'retired,' giving no indication as to their income. There was a high percentage (26.1%) of these respondents (Figure 3.2). Compared to 1991 statistics for Great Britain (Advertising Association, 1992), the visitor sample (excluding the miscellaneous category) contains less B's and D's but a greater proportion of C1's.
The respondents were categorised into visitor groupings. Family groups and couples were very dominant in the sample, over two-thirds of the respondents were at the visitor attractions in one of these group types (Figure 3.3). The respondents at the visitor attractions as part of an organised group were 5.7 per cent of the sample. The results for the number of visitors in the respondents groups are compatible with the above findings. Over 70 per cent of the respondents belonged to a group containing 2 to 4 people (Figure 3.4).
A dependence on the car as a mode of transport is shown by the results in Figure 3.5. With the 'own car' and 'hired car' categories combined, over three quarters (76.6%) of the respondents were recorded as travelling to the visitor attractions by motor car. These results are not unexpected, as over 80 per cent of holiday trips to and within Wales are made by car (Wanhill, 1992).
The results in Figure 3.6 (showing how the respondents 'learned' of the visitor attractions) emphasise the local involvement in tourism. The local knowledge (42.8%) and word-of-mouth recommendation (23.7%) channels are of major importance to the visitor attractions. The costly methods of advertising eg. press and television, are of little significance. All of the attractions were represented at Garden Festival Wales, but only 1.1% of respondents 'learned' of the visitor attractions via this means.

% OF TOTAL SAMPLE

(BASE: 2121)

FIGURE 3.6 How Respondents Learned of the Visitor Attractions

The domicile of respondents at the time of interview, is depicted in Figure 3.7. As expected there was a greater representation from South Wales, particularly of the counties Mid-Glamorgan (13.5%), South Glamorgan (8.9%) and Gwent (19.3%). There was also a greater representation of respondents from the English counties closest to the visitor attraction sites (ie. Hereford and Worcester, Gloucestershire and Avon). The South East was also a significant area, in particular Greater London (3.3%) and Hampshire (2.7%).

Overseas visitors accounted for 12.6% of the respondents. In order of representation the U.S.A. market was highest (3.0%), followed by Germany, Australia, France and Canada. In terms of the main overseas markets to Wales, these results are consistent with the International Passenger Survey figures of overseas visitors to Wales in 1991 (W.T.B., 1993 a.)
FIGURE 3.7  Domicile of Respondents
The domicile of respondents obviously had a bearing on whether they were day visitors or staying visitors. The relatively equal breakdown of respondents into these categories is shown in Figure 3.8. The growth in the number of tourist attractions in Wales is in itself considered to be evidence of the growth in the day visitor market to Wales (W.T.B., 1993 a). Though it is stated by the W.T.B., in their 1992/3 Annual Report, that this market is likely to have been adversely affected by the economic recession, it appears that the day visitor is under-represented in the sample.

![Figure 3.8](BASE: 2121)

**FIGURE 3.8**  Categorisation of Respondents into Day-Trippers and Staying Visitors

The accommodation used by both overseas and domestic respondents who were staying in Wales overnight is shown in Figure 3.9. Though 'friends and relatives' was ranked highest accommodation category, the figure (26.2%) is less than the 1991 figure for accommodation used by domestic visitors to Wales (W.T.B., 1993 b). The survey figures for serviced accommodation ie. hotels, guest houses and B and B's were higher, at the expense of the self catering and caravan categories, in comparison to 1991 figures (W.T.B., 1993 b).
The location of the overnight stayers' accommodation is depicted in Figure 3.10. A significant number of respondents were staying in Cardiff, Newport, Brecon, Abergavenny and Monmouth. When respondents were staying outside the cities and towns listed they were categorised into distance bands from the Garden Festival Wales site. Only 3.2 per cent of respondents were staying within a 10 km radius of the site, but 28.8 per cent of respondents were staying within a 10 - 25 km radius. Respondents staying beyond 25 km in Wales and beyond 25 km in England were in relatively equal proportions (12.3% and 12.7% respectively).

The length of stay of respondents who were staying in Wales (Figure 3.11) shows a high percentage (35.2%) of 1-3 nights. Even with the growth and development of the short break market in recent years, this figure is high when compared to those stated for Wales in the United Kingdom Tourism Survey (U.K.T.S.) 1992 Trend Report (N.O.P. Travel & Leisure, 1993). The results for longer stays of 4 plus nights, peak at the week (24.8%) and fortnight (8.7%) intervals. The importance of Wales as a traditional domestic holiday destination (W.T.B., 1993 b) is reflected by these results.
FIGURE 3.10 Location of Staying Visitors' Accommodation
Of these respondents the majority were staying in one place as opposed to touring (Figure 3.12). However, when compared to the 5 per cent figure for domestic tourists to Wales on a touring holiday in 1990 (Wanhill, 1992), the number of respondents touring appears high. It should be noted therefore, that the respondents staying overnight include a significant number of overseas visitors who have a greater tendency to tour than the domestic visitor.
Very few (8.3%) of the overnight stayers were on an all-inclusive holiday (Figure 3.13). Nearly half of these package tours included admission to Garden Festival Wales (Figure 3.14). A smaller segment of these included admission to one or more visitor attractions in addition to Garden Festival Wales. Brecon Beacon Holidays and Saga were the Operators most frequently quoted.

**FIGURE 3.13** Organising Arrangements of Respondents Staying Overnight

**FIGURE 3.14** Package Tour Inclusions
Of the respondents staying overnight 29.8% stated that their image of Wales had been changed in a positive context (Figure 3.15). This figure is similar to that reported by the Garden Festival Wales Exit Poll (G.S.G., 1992) which quotes 27% of visitors from outside Wales as saying that the Festival had altered their image of Wales. There was a significant number of respondents in the survey who either lived in Wales or were very familiar with Wales and so considered themselves not applicable to the question. The intention of the overnight stayers to visit Wales again was very high (Figure 3.16). The small percentage who did not think that they would visit Wales again, tended to be overseas visitors.

**FIGURE 3.15** Change in Overnight Stayers' Image of Wales

**FIGURE 3.16** Overnight Stayers who Stated That They Would Visit Wales Again
A significant number (67.1%) of respondents had not visited Garden Festival Wales at the time of interview (Figure 3.17). This figure is high, though nearly half of these respondents expressed an intention to visit the Festival (Figure 3.18). The more costly means of communication, i.e., television, radio, and the press were of major importance in creating awareness of Garden Festival Wales (Figure 3.19). Though local communication channels are emphasised, they are not as significant when compared to their role in creating awareness of the visitor attractions themselves (Figure 3.6). Despite the Garden Festival Wales advertising campaign, 4.4 per cent of the sample were unaware of the Festival.
A large number of respondents considered that Garden Festival Wales would affect tourism in South Wales (Figure 3.20). On further investigation of this, it was found that respondents considered the 'effects' (impacts) to be beneficial and mainly short-term (Figure 3.21). Many respondents considered that Garden Festival Wales would attract more tourists during the Festival period, hence they viewed it as a significant visitor attraction. There was a tendency for respondents to state more than one impact, the consequence being that the total in Figure 3.21 is greater than 100 per cent. Some long-term benefits such as increased awareness and improved image were stated, but less frequently. The impacts categorised as 'other' (4.7%) tended to be negative.
FIGURE 3.20 Respondents' Opinions on Whether GFW Would Affect the Local Tourism Industry
FIGURE 3.21  Respondents' Opinions of How GFW Would Affect the Local Tourism Industry
The association of the respondents to Garden Festival Wales is depicted in Figure 3.22. Of the respondents staying overnight in Wales (48.8%), nearly one-third of these had been influenced by the Garden Festival when making their decision to stay. This figure appears significant. However, only one-fifth of the overnight stayers were fundamentally influenced by the Festival i.e. they would not have visited Wales had the Festival been held outside of Wales. This is just over 10 per cent of the total number of respondents interviewed at the visitor attractions.

![Figure 3.22](image)

**FIGURE 3.22** Association of the Sample to GFW

The distribution of these respondents across the visitor attractions shows marked differences according to resource type (Figure 3.23). Respondents staying overnight formed a large proportion of visitors to the industrial/craft attractions. Consequently those respondents heavily influenced by Garden Festival Wales were well represented at these attractions. This pattern lessened in significance regarding the historic properties. The countryside attractions and museums and art galleries were much more reliant on the day tripper.
FIGURE 3.23 Respondent Categorisation at Each Attraction Resource Type
CHAPTER 4.

HOST SURVEY RESULTS

"All our knowledge has its origins in our perceptions"

(Leonardo da Vinci)
As shown in Figure 4.1 the change in visitor numbers at the attractions during the 1992 summer season is reflected in one of three ways i.e. an increase, a decrease or negligible. Six visitor attractions in the sample experienced an increase in visitors as opposed to either a decrease in numbers or a negligible effect, however this majority was marginal. Five interviewees stated that any changes in visitor numbers had been negligible and five interviewees said there had been a decrease.

However, the evidence suggests that the museums and art galleries and historic properties were the attractions which experienced either a decrease or no change. The increase in visitor numbers was mainly at the countryside and industrial/craft attractions. One historic property and one museum and art gallery had an increase in visitors. The reasons for this were made clear and were individual to those attractions:

"A lot of interest was generated by the fact that we've got a medieval garden, that's relatively new, so it was its first full summer really this last summer."

(Custodian, Historic Property)
"The only increase we really noticed was the number of people who used the Tourist Information Centre for bed booking ..."

(Curator, Museum and Art Gallery)

In answer to what factors they considered to be responsible for these changes in numbers at their attraction the interviewees mentioned a number of different factors. The majority of interviewees (13/16) attributed change to a combination of factors, both internal and external. Figure 4.2 depicts a number of variables and the considered impact of these on the attractions. Those attractions which experienced a decrease in visitor numbers considered the recession a key factor:

"... I think economics comes into this ... we're in a time of recession and everyone is generally feeling that visitor figures are a bit down."

(Curator, Museum and Art Gallery)

Related to this was competition for discretionary income:

"Golf is another thing and the fact that the Superstores are open on a Sunday. At one time there was nothing open so it was, 'Where shall we go? We'll pop to Caerphilly Castle, Castell Coch, Chepstow,' but because these shops are open ... we can look from our window at the carparks in Asda and the Garden Centre and they're full. You can't spend money twice."

(Custodian, Historic Property)

Another factor considered to have had a negative effect was that of inadequate signposting:

"Our main problem here, which is my main complaint, is lack of signposting. I think people were coming to the town, going into the town, seeing the town, but not finding the Museum."

(Curator, Museum and Art Gallery)
As shown in Figure 4.2 other variables affected some attractions in a negative way, in particular the museums and art galleries, while having a positive affect on others. The weather was an example of this and is a reflection of the type of resource at that attraction:

"The weather was good which is usually bad for us because people don't tend to come to the museum. We had a tremendously long spell from March onwards and hot weather is just bad for museums."

(Curator, Museum and Art Gallery)

"The numbers were up slightly but that has to do with the weather, I think. We had better weather this year than last year... 1991 was a particularly bad year, then it was very wet if you remember."

(Warden, Countryside Attraction)

Internal circumstances specific to each attraction were also considered by the interviewees to be responsible for changes in visitor numbers. Construction work had affected three attractions at some point during the 1992 season:

"We are now doing a social history display and invariably during the summer months we didn't close the museum but there was quite a lot of construction work going on providing a somewhat noisy..."
environment. So probably we didn’t have the amount of people that we would have had normally."

(Curator, Museum and Art Gallery)

However, many of the internal changes to the product had a beneficial effect on the visitor numbers:

"The increase in visitor numbers here over the past two seasons have been solely through our efforts, principally the cafeteria."

(Senior Forest Ranger, Countryside Attraction)

"We were experimenting with new events and things of this sort which also had an impact on the visitor figures."

(Manager, Industrial/Craft Attraction)

In all cases where sustained and new approaches to marketing had taken place, the approaches were considered to be effective at attracting additional visitors:

"It’s a question of word-of-mouth recommendation and working through agents and so forth. We’ve been pleased with the rate of growth there and certain initiatives of keen pricing to get people in at particular times, have obviously helped that process."

(Manager, Industrial/Craft Attraction)

"We’re prepared to do cartwheels for the press if it will help. We do try and ensure that we get good media coverage."

(Manager, Industrial/Craft Attraction)

Figure 4.3 shows the number of interviewees who considered that the Garden Festival had an impact on their visitor figures and the effect. Those who considered the Festival partly responsible for a decrease in visitors numbers perceived it as an additional attraction in a static market:

"Our figures are down here ... there has been a dropping off but last year was even more noticeable. As far as the Garden Festival is concerned it didn’t bring visitors to us, it may have taken visitors from
us because it's another attraction in the tourism industry."

(Custodian, Historic Property)

However, there were interviewees who considered this to be advantageous:

"In the end it turned out to be quite beneficial. What tends to happen with tourism sites is because everyone is under pressure to get a certain number of bodies through the door you do get a feeling of competition. One thing that the Garden Festival showed really was that there's scope for quite a lot more cooperation than is going on at the moment ... that people are more likely to stay in an area if there are a few things for them to go and see. Perhaps we're being very blinkered here in the tourism trade by looking at how we can get people just here rather than how we can get them into the area and share them."

(Manager, Industrial/Craft Attraction)

A number of interviewees were aware of a 'substitution' effect taking place at their attractions which they attributed to Garden Festival Wales. The combination of an increase in visitor numbers belonging to one market segment with a decrease in numbers from a different target market balanced so the net effect was negligible:

"What actually happened with the Garden Festival in the main was, alright it brought in a number of people from outside the region, but it also mopped up the internal market within the region."

(Curator, Museum and Art Gallery)
"Our local visitors at weekends went down because of it, our numbers of visitors from further afield went up because of it."

(Manager, Industrial/Craft Attraction)

"Coach parties compensated for the lack of schools which we know was directly attributable to the Garden Festival."

(Marketing Officer, Historic Property)

Interviewees identified changes in particular market segments at their attractions. In doing so the managers were specific and able to identify the main causes of such changes. The impact of Garden Festival Wales on particular attractions became more apparent. Figure 4.4 shows the changes in particular market segments perceived by the interviewees. A decrease in the schools market was experienced by attractions of each resource type and the evidence suggests that the Garden Festival was largely responsible for this:

"In July this year, the impact on our school visits was quite dramatic. The group visits for July went down 6,000, a 30 per cent drop. We only had one school from the whole of Gwent in, during those few weeks and that was the Cwm School from Ebbw Vale. The evidence points at the Garden Festival. Up until then the Garden Festival was quite worried about their number of school visits, but suddenly the picture was transformed, they had an enormous number and actually exceeded the target."

(Manager, Industrial/Craft Attraction)

It seems that the schools market can be divided into two types of visit, the solely educational visit and the annual school trip that places less emphasis on the educational aspect of the visit. The stated reasons for an increased number of school visits at other attractions had a greater emphasis on educational purpose associated with the requirements of the National Curriculum:

"That increase is simply to do with the National Curriculum, the fact that schools are now required at junior level to teach an option - a course on Early Peoples, and we're the natural place to come. So as far
as that's concerned I can't imagine that the Garden Festival had any effect."

(Curator, Museum)

The evidence suggests that those attractions who lost a portion of their school market to the Garden Festival were those attractions reliant on the annual school trip:

"I suspected that perhaps the Garden Festival wasn't going to be as useful to schools as perhaps the Museum would be, it was basically a fun-day out as opposed to an educational."

(Curator, Museum and Art Gallery)

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**FIGURE 4.4** The Changes of Particular Markets at the Attractions During the 1992 Summer Season

Figure 4.4 shows that four attractions experienced a decline in coach parties. Three interviewees attributed this to the Garden Festival. For example:

"We lost nearly all of the coach travel business and I presume to the Garden Festival because they had large quantities of booked coach tours. We had absolutely no coach tours whatsoever during the period of the Garden Festival. This accounted for about 9,000 to 10,000 visitors."

(Curator, Museum and Art Gallery)
"Our group visits were actually down by 20 per cent, it's a relatively small ingredient in our overall market anyway, but it was down despite the fact that we were in itineraries promoted in conjunction with the Garden Festival."

(Manager, Industrial/Craft Attraction)

Three other attractions involved in coach tour itineraries experienced an increase in visitors belonging to this market segment. This was attributed to tours operated in alliance with the Garden Festival. This is considered in detail later in the text.

Many interviewees observed a change in the pattern of their casual/domestic visitors. The reasons for this were largely a reflection of the variables stated previously (Figure 4.2), including the positive and negative impacts of Garden Festival Wales (Figure 4.3). This is typified by two of the interviewees reiterating the substitution effect of Garden Festival Wales.

It is worthwhile noting that statements referring to changes regarding specialist visitor markets and the overseas market were not attributed to Garden Festival Wales in any way.

Figure 4.5 represents the response of the managers as to whether they expected the Garden Festival to have an impact on the type of visitor or visitor numbers to their attraction, prior to the opening of the Festival. The majority (13/16) of interviewees expected that the Festival would have some impact. Of this number, eight thought that this would be positive and five expected this to be negative. The arguments put forward were as follows:

"... they were marketing the Garden Festival all over the country and we were one of the closest tourist attractions for people driving to the Festival."

(Warden, Countryside Attraction)
"I'm a cynic ... because of the lack of infrastructure visitors don't stay. My impression was that we’d get loads of day visitors and they would spend the day at Ebbw Vale and then they’d go home afterwards and we wouldn’t see any of the spin-off."

(Curator, Museum and Art Gallery)

There were three interviewees who did not expect the Garden Festival to affect them at all:

"I don’t think I had any great fears because I’ve always known the specialist nature of our visitor here is not the sort of visitor that’s going to be dented by the Garden Festival."

(Curator, Museum)

Interviewees were either personally involved or aware of actions taken by their organisational hierarchy, to counter or maximise the potential effects of Garden Festival Wales. Even those interviewees who did not expect their attractions to be affected were involved in promotional campaigns:
"I would sit through long discussions about the Festival thinking, 'What's this to do with me?' The other participants, attractions of more general interest, there was a lot in it for them ... but my feeling was always, we're not going to tap into the extra market too much."

(Curator, Museum)

Interviewees made reference to other marketing approaches that were aimed at increasing visitor numbers and were not directly related to the Garden Festival though may have attracted visitors that were in Wales as a result of the Garden Festival.

The measures taken as a direct result of Garden Festival Wales that were mentioned by the interviewees can be grouped into four categories as listed in Figure 4.6. Local Authorities, Cadw and the National Museum of Wales had a physical presence on the Festival site. This took various forms eg. exhibitions, stands, themed attractions etc. In this context, the majority of visitor attractions (14/16) were represented on the Festival site. The promotional leaflets relating to the attractions were distributed at these outlets. Only one interviewee considered this to be successful. The remaining interviewees who were involved stated that they had no way of judging the effectiveness of this promotion, but many were sceptical:

"I think with leaflets people tend to pick them up when they're at the Festival, but never really read them. There is so much information available, you pick it up, scan it and that's about it."

(Senior Forest Ranger, Countryside Attraction)

The members of the consortium G.A.T.A. (the Gwent Association of Tourist Attractions) considered it necessary to counter the potential negative impact of the Garden Festival and as a result of this the 'Passport to Gwent' initiative was instigated. This involved seven attractions in the sample. G.A.T.A. produced a leaflet which promoted all the attractions in the Association. The 'Passport to Gwent' leaflet included a sales promotion in the form of a competition. The aim of this promotion was to encourage visitors to visit the attractions belonging to the Association. In doing so the visitor collected points
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FIGURE 4.6 Measures Taken as a Direct Result of GFW

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<th>Museum and Art Gallery</th>
<th>Industrial/Craft Attraction</th>
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and on attaining a certain number of points, the visitor could then enter the competition to win a four-wheel drive Suzuki Vitara.

Not one of the interviewees considered this to be effective, four did not know and three considered the scheme unsuccessful. Some of their reasons are given below:

"We thought that the Garden Festival's main contribution would be to generate traffic with their own cars, the kind of people that we rely on day in, day out, because we're not on the public transport network in common with most of our partners in the Association. The car-borne visitors are the most expensive for us to try and promote and we thought that we would try and piggy-back on the Garden Festival's massive marketing budget. The Garden Festival offered the facility of distributing the Gwent Association leaflet when people were going back to their cars. In the event, the distribution was very haphazard really. We had 700,000 printed and they distributed less than 300,000. It didn't get into enough hands or the right hands ... it was meant to be a tightly targeted campaign."

(Manager, Industrial/Craft Attraction)

"It wasn't going to have the impact that they were expecting and that was proved by the number of people who asked to have their leaflet stamped for the competition. It was very low. The people who came down for the Garden Festival, perhaps for a weekend or week at the most ... the chances of them doing the Garden Festival, which was probably a two day thing to make the most of it, and then trying to get to all of these other attractions to get maximum points, wasn't really feasible."

(Marketing Officer, Historic Property)

The two countryside attractions were not represented by a Forest Enterprise stand on the Festival site, however the organisation produced a publication, Y Goedwig, as a result of the Festival. This also included a competition aimed at encouraging people to visit the Forest Enterprise recreational sites:
"To be honest I think that it was decided at last minute that we should have some input. At every other Garden Festival we have had some contribution to make ... we've had large exhibits, but this time we didn't have anything. Only a certain amount of money was set aside and the best that we could do was produce this publication."

(Senior Forest Ranger, Countryside Attraction)

Basing their opinion on the response to the competition, the interviewees considered the publication to be unsuccessful in achieving its purpose:

"Thirty-two thousand publications were distributed on the Garden Festival site, another 50,000 were distributed through people's doors in South Wales. There were 70 entries to the competition so no great response really."

(Senior Forest Ranger, Countryside Attraction)

A marketing ploy associated with the Garden Festival that was considered to be more successful (Figure 4.6) but involving fewer attractions in the sample, was the coach itinerary operated in conjunction with Garden Festival Wales. This involved visiting two historic properties and two industrial/craft attractions. It seems that the interviewees could encourage the Coach Operators in terms of 'familiarisation visits' but the decision as to the inclusion of the attraction in the itinerary remained at the discretion of the Coach Operator:

"Well before the Garden Festival actually started, the Wales Tourist Board were promoting the Garden Festival to their overseas market and they brought an awful lot of Tour Operators here, Tour Operators who might organise tours to the Festival. They'd come here and my job was then to take them around and convince them that if they were bringing people to Wales they had to come and visit our attraction. Hotels would be represented as well so it was very much a package."

(Marketing Officer, Industrial/Craft Attraction)
The results of involvement in these coach itineraries were considered beneficial by two managers. For example:

"Coach parties in June, July and August were much higher. There were three coach companies who were doing the joint Garden Festival and another attraction sort of thing for the weekend and so every weekend we had a huge number of coach parties. Saga Holidays was one, Enterprise Travel was another and Hilton International Hotels, the other."

(Marketing Officer, Historic Property)

However, others were less enthusiastic:

"We did provide facilities for both Garden Festival staff and for 'fam' visits by prospective Tour Operators and handling agents in the hope of picking up some kind of trade. We weren't successful in that."

(Manager, Industrial/Craft Attraction)

"They came to see the Garden Festival ... coach tours ... every Monday during the summer. Some of them came here as well, some of them didn't. They were allowed here if they wanted to, it was in their programme, but on quite a few Mondays it was tipping-it-down with rain - so they didn't bother."

(Custodian, Historic Property)

The following quote from an interviewee whose attraction was not officially included in any itineraries operated in conjunction with the Garden Festival, highlights the difficult situation of the managers who have very little control over the Coach Operators decision:

"I don't know which Tour Operator was here because of the Garden Festival, but there were no more coach parties. Those that did come would come to the site, not want to pay to go in and go down the side. That was quite annoying because the visitors weren't getting the site as it should have been viewed."

(Custodian, Historic Property)
The measures taken by the managers of the attractions that were not directly related to the Garden Festival included promotions and advertising that would have occurred regardless of the Festival, but utilised the existence of Garden Festival Wales to the advantage of the attraction:

"We always mentioned a three-quarter of an hour drive from the site of the 1992 National Garden Festival at Ebbw Vale. Visitors weren't going to come to South Wales just to visit our attraction - there was a greater likelihood that they'd visit South Wales to see the Garden Festival and then come here as well."

(Marketing Officer, Industrial/Craft Attraction)

"We tied in some of our advertising to the Garden Festival in the sense that we made a point of telling people how long it would take to reach us from the Garden Festival and what route to take."

(Manager, Industrial/Craft Attraction)

A large number of interviewees were not aware of the effectiveness of their promotional campaigns associated with Garden Festival Wales. The evidence suggests that this is attributable to one or a combination of two reasons. First, very little related market research at the attractions actually took place. As shown in Figure 4.7, five interviewees stated that market research was undertaken at their attraction during the Festival period. Two of these studies included questions that were directly linked to Garden Festival Wales therefore only two interviewees could estimate with any accuracy what percentage of their visitors also visited the Garden Festival. Both managers from industrial/craft attractions estimated that 45 per cent of their visitors had also visited the Garden Festival.
The second reason, as suggested by Figure 4.8, was that although fourteen of the attractions were represented on the Festival site in some way there was a varying degree of consultation with the attraction managers regarding this. As stated previously, representation of the attractions had been the responsibility of the 'umbrella' organisations, particularly the Local Authorities. The three additional interviews with representatives from the 'umbrella' organisations, provided
further information regarding the representation of attractions at the Garden Festival, particularly when the managers were not consulted and decisions were made at a higher level in the organisation.

Consultation with the interviewees from the historic properties was very low. The interviewees at all of the Cadw sites stated that the representation of their attractions had been taken care of by Head Office and they had not been involved:

"An organisation like Cadw tends to be very departmentalised, so we as custodians, don’t have the involvement in the publicity. It’s not because we don’t want to, it’s the way the system works and as far as the actual Garden Festival goes I had no involvement with that whatsoever."

(Custodian, Historic Property)

Those interviewees consulted by their local authority, all stated that it was the result of their membership with G.A.T.A. (Figure 4.9).

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<th>LOCAL AUTHORITIES</th>
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**FIGURE 4.9** Involvement of Interviewees With Their Local Authorities in Making Decisions Regarding Representation of the Attractions at GFW
In terms of the decision making processes of Garden Festival Wales ie. those associated with staging the event, and the Festival itself, only one manager had a direct involvement. This had been in a previous employment capacity with the Festival Company and not in the capacity of the interviewee's current position at the attraction:

"I think it's part of the reason why they gave me the job here because I had contacts there. I considered myself as being very fortunate to be involved with both projects."

(Marketing Officer, Industrial/Craft Attraction)

As shown in Figure 4.10 the majority (11/16) of interviewees felt that there had not been enough coordination between the relevant interests, regarding the decisions associated with Garden Festival Wales:

"We weren't consulted in any meaningful sense about how the event should take place. In fact, that was one of the disappointments to my mind, was its lack of integration. They joined G.A.T.A. as a member, but a pretty passive kind of member, more of a PR exercise rather than any meaningful consultation, and they were quite dismissive of the concerns we were voicing. They might have benefitted by being a little more receptive and to integration into the existing tourism product in the area."

(Manager, Industrial/Craft Attraction)

"I was slightly disappointed. I think the County and the Borough could have gone about it in a more constructive manner by perhaps getting together and debating what they may or may not be able to provide. Instead, I actually hadn't a clue what was provided, until I walked in to see it."

(Curator, Museum and Art Gallery)
This is supported by the fact, as reflected in Figure 4.10, that ten interviewees would have liked to have had a greater involvement with the Festival, to a varying extent:

"We ended up in a situation of being quite isolated from everything that was happening there. I'd have liked to have been much more involved. I couldn't help but think what a wonderful impact we would have had, even if we'd done something fairly basic. It seems to me that we missed some good opportunities."

(Manager, Industrial/Craft Attraction)

"I'd have liked to have been invited to go up ... I think it would have been political for most of us on site to see what was on offer, bearing in mind we don't have much time off during the summer. People would ask me, 'What's it like?' and I would say, 'Sorry, all I can say is that the reports are coming favourably through.'"

(Custodian, Historic Property)

Although in the minority, some interviewees (2/16) considered that the coordination had been adequate:
"The opportunity was there for everyone to get involved, whether they did or not was down to them. At the end of the day it's up to the individual."

(Marketing Manager, Industrial/Craft Attraction)

Others agreed, they thought that any greater involvement on their behalf, would have been futile:

"I don't think in our situation that there would have been a great deal of point in me getting involved, to be honest, because we're not really in a position to pick up very much from the Garden Festival. We are essentially a small, local museum."

(Curator, Museum and Art Gallery)

It was interesting that all three interviewees representing the 'umbrella' organisations, considered that there had been enough coordination among the relevant interests. They were fully satisfied with their personal and organisational input to the Garden Festival:

"Full marks to the W.T.B., they pulled the strings together and did it relatively well. We were involved in discussions as groups. Of course once it got underway we were solely concerned with our own presence there, but there was a lot of pre-discussion."

(Representative, National Museum of Wales)

The interviewees' personal opinions became more apparent as they considered the perceived impact of Garden Festival Wales on the local tourism industry, in more general terms, as opposed to the actual impact of Garden Festival Wales on their visitor attractions.

Three of the sixteen interviewees were unaware of the W.T.B.'s policy to establish a Welsh identity among the tourism industry. When asked to express an opinion on the image of Wales portrayed by Garden Festival Wales, only two respondents said that the Festival reflected W.T.B. policy and even then expressed reservations:

"I can see that it was a logical follow-on from the 'Wales for You' campaign that the W.T.B. is doing at the moment, but the Garden
Festival did have a very strong corporate identity of its own. 'Gryff' for example, was very visible. Their corporate image was so strong that, I think in a way, it became a thing slightly in isolation from what was being done by the W.T.B."

(Manager, Industrial/Craft Attraction)

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FIGURE 4.11 Interviewees' Perceptions of the Image Portrayed by GFW in Terms of WTB Policy

Seven interviewees said that a Welsh identity was not portrayed by the Garden Festival at all (Figure 4.11) Some accepted this as necessity:

"I personally think that they didn't really play on the Welsh theme ... I expressed concern about that ... but at the end of the day they had to address what the customer wanted. They had to use the Welsh culture within reason and do it to the extent the tourists wanted."

(Marketing Officer, Industrial/Craft Attraction)

Others were more critical:

"I'll be perfectly honest with you, I think it portrayed absolutely nothing of Wales. It was a large body of well-versed, well-practised Garden Festival organisers who have done quite a few before. In fact, what happens is that you end up with an 'off-the-shelf' Garden Festival. Yes, it's tailored to the site but there were honestly very few elements that I felt said an awful lot about Wales.

If you're having a Garden Festival, you've got to think why you are actually doing it. Well, the idea was to bring a bit of life and colour to what was a barren bit of industrially destroyed, landscape in South Wales ... In many ways they'd have done better to have drawn wherever possible from the resources in South Wales, and there's plenty of people with ability in the area, and then it would've had
its own unique character."
(Curator, Museum and Art Gallery)

The managers were asked to consider the Garden Festival Wales 'image' in more general terms of whether it was favourable or unfavourable. The interviewees were more specific and stated their personal observations and opinions regarding the Festival. As shown in Figure 4.12, fourteen managers said that Garden Festival Wales had projected an unfavourable image. The reasons supporting these statements tended to reflect issues associated with the Festival's lack of identity, particularly 'Welshness,' which had already been stated previously by some interviewees. Ten interviewees mentioned the Garden Festival identity in an unfavourable context:

"It came over in pretty much the same way had it been in the North of England or Scotland or anywhere else. I think some of the people, who have to deal with promoting events in Wales, have a little bit of difficulty in coming to terms with Welsh culture, history and identity, and they tend to go for the clichés, which some of us who live here find a little bit irritating."
(Curator, Museum and Art Gallery)

"It's a Garden Festival identity, rather than a locality. It seems to have an 'Alton Towers' feel about it, and it doesn't much matter where you put it because it takes it's identity with it. I don't think that being in Wales made much difference to this."
(Curator, Museum)

"They had this rather strange cartoon character called 'Gryff,' which therefore means he must be Welsh. I'm not convinced about that, in fact in many ways I felt that he had more in common with a Belgian Smurf!"
(Curator, Museum and Art Gallery)
However, seven of the interviewees also wished to state that there were positive aspects of the Garden Festival that would project a favourable image to visitors. Once again, all of the interviewees tended to highlight one particular point. In this instance it was the actual Garden Festival site:

"Some visitors said that they'd been to all of the Garden Festivals, and they thought that the backdrop, the scenery, was far better in Ebbw Vale than anywhere else they'd been ... which, if you look down the valley in one direction, was true ... it was beautiful."

(Manager, Industrial/Craft Attraction)

As for the portrayal of Garden Festival Wales by the media, the interviewees responses varied and, as shown in Figure 4.13, there are no identifiable patterns. The majority of interviewees (14/16) mentioned one of two issues. Some managers gave their opinion of the extensiveness of the coverage in both the press and television/radio. Others focused on the representativeness of the coverage within the context of their perception of the Garden Festival Wales identity, stated previously. Two of the interviewees thought that the Festival had attracted adequate coverage from the media:

"I think B.B.C. Wales Radio gave it fair coverage ... they gave it a lot of space. They ran shows from there and interviewed people virtually every day."

(Custodian, Historic Property)
Two managers considered the media coverage to be inadequate:

"I didn’t think there was much hype. Some of it came too late to be much use ... I think that the ‘Highway’ broadcast was on the last day of the event. There didn’t seem to be a very well orchestrated campaign of publicity outside the region ... The Garden Festival hasn’t brought the media attention, that we thought might accrue, to the area generally."

(Manager, Industrial/Craft Attraction)

A greater number of interviewees (10/14) expressed their opinions on the representativeness of the coverage. Four considered it to be accurate:

"I suppose it came across fairly accurately ... I didn’t feel that anyone was trying to sell me a lie."

(Curator, Museum and Art Gallery)

However, six interviewees thought that the portrayal of Garden Festival Wales by the media was inaccurate, for various reasons:

"I rarely think that anything Welsh is accurately portrayed by the media, being quite honest. Things are forced into fitting the media’s stereotype of Wales. I think to a certain extent this patronage crossed with the ‘How Green is My Valley,’ view of Wales, crept through in the way the Garden Festival was
portrayed outside Wales."

(Manager, Industrial/Craft Attraction)

"I thought that some of the gardening programmes gave a very false image because they concentrated purely on a gardening section and they would have probably given people the idea that it was all gardening and it wasn't."

(Curator, Museum)

The managers were asked their opinion as to whether Garden Festival Wales had increased awareness of Wales as a tourism destination, among the U.K. market. As shown in Figure 4.14, thirteen interviewees stated that national awareness would have been increased as a consequence of the Garden Festival:

"Taking the U.K. market, despite the fact that a stereotypical image came through in the press, I still think that its very existence helped to challenge people's preconceptions."

(Manager, Industrial/Craft Attraction)

"I suspect it probably did ... yes. I mean the sheer visitor numbers that they did get."

(Curator, Museum and Art Gallery)

In an indirect way, Wales was promoted, but not in a direct way. It may have been promoted as a result of the Garden Festival, but I don't think it was promoted in the Festival itself ... it encouraged people to come and stay in the area and see other things."

(Marketing Officer, Industrial/Craft Attraction)

However, a number of these interviewees also pointed out that the extent to which the visitor's awareness would have been changed was dependent on the length of the visitor's stay in Wales:

"Probably some, because they'd spend more than one day here, and then see other parts of Wales at the same time. A lot of coaches stayed for four to five days, so they'd have seen things
FIGURE 4.14
Interviewees' Perceptions of the Role of GFW in Increasing Awareness of Wales as a Tourism Destination (U.K. Market)

FIGURE 4.15
Interviewees' Perceptions of the Role of GFW in Increasing Awareness of Wales as a Tourism Destination (International Market)
other than the Garden Festival."
(Custodian, Historic Property)

"If you're talking about a coach party that came down from the Midlands for the day, to the Garden Festival, they're only going to be able to do the one thing in the one day."
(Curator, Museum)

"Because a festival is so obviously a festival... it's like if you go to a fairground in a town, from outside. You go to a fair, but the fair doesn't make a town."
(Curator, Museum and Art Gallery)

In terms of increased awareness in the international market, the managers reached opposite conclusions (Figure 4.15). Eleven interviewees considered that Garden Festival Wales did not influence awareness in this market. The reasons given for this are summarised by two interviewees:

"A lot of our international visitors were going to Garden Festival Wales, but I think that its chance of having a great impact is limited because it was only there for a year. It would need to be there a lot longer and better established to actually start to attract people... it needs to develop a reputation of its own."
(Manager, Industrial/Craft Attraction)

"People will travel from all over the world to come to South Wales and they're coming because of their interest in the industrial heritage and, in some cases, its link with their family history... that would've got them here anyway. I'm sure that the Garden Festival was an extremely pleasant discovery, that it was on... rather than that's why they came. I know that we had no fewer foreign visitors than normal."
(Curator, Museum and Art Gallery)

In answer to whether Garden Festival Wales had influenced the visitor's image of Wales (Figure 4.16), the majority of respondents (13/16) were of the opinion that those visitors who came to Wales, and
had not visited previously, would have left with a changed perception of the area:

"If it brought people in for the first time, then it's bound to have altered their image. By and large they have a pretty old-fashioned impression of the South Wales Valleys. That was significantly whittled away ... if they came at all."

(Manager, Industrial/Craft Attraction)

"It brought people into Wales. I'm sure a lot of people think of South Wales as very industrial ... mines, steelworks, that sort of thing. It will have changed people's ideas ... more countryside than they would imagine. It would have been positive rather than the opposite."

(Marketing Officer, Industrial/Craft Attraction)

Some interviewees stressed that this changed perception could also be in a negative sense:

"It would depend on which day they went ... those who went when it was pouring with rain ... I wouldn't think that would encourage them to visit Wales again. I mean Ebbw Vale in the rain isn't the best place on earth to be."

(Curator, Museum)

"Some people may have come down for a few days, made the most of their visit and gone off to the Gower, or through Mid-Wales or something, and they would have gone away I'm sure with a favourable impression. Now those who came down on the Coach for a day may have been disappointed with what they saw."

(Senior Forest Ranger, Countryside Attraction)

This caution was reflected in the interviewee's perception of the word-of-mouth recommendation that would have been generated by the visitors. As shown in Figure 4.17, a lesser number of interviewees [6] thought that this would have been positive. Seven managers were very unsure and gave their reasons for this. Many of the statements reflected the examples stated previously:
FIGURE 4.16 Interviewees' Opinions of the Role of GFW in Changing Visitors' Perceptions of Wales

FIGURE 4.17 Interviewees' Opinions of the Influence of GFW on Positive Word-of-Mouth Recommendation

FIGURE 4.18 Interviewees' Opinions of the Influence of GFW in Encouraging Repeat Visits to Wales
"I would think that it probably did something for South Wales, whether that's good or bad, I really wouldn't like to say. If you went to the Garden Festival on a very wet day, quite honestly it could have, through no fault of the organisers, just entrenched people's ideas ... 'Oh, don't go to South Wales it just rains all of the time.' "

(Curator, Museum and Art Gallery)

"I think a lot depends on why they went there ... the 'garden purists' who were going simply for the gardens, some of those were disappointed. But, those who came out of curiosity and perhaps coming to Wales for the first time, were favourably impressed with the whole ambience of the area. They'd had friendly accommodation, people had been pleasant to them and they'd come away with a positive impression."

(Manager, Industrial/Craft Attraction)

There was further clarification of this double-sided argument when interviewees considered the likelihood of repeat visits. Once again the majority (9/16) of interviewees were unsure, as shown in Figure 4.18:

"A Garden Festival sort of event is a one-off. It's not like if you go to Disneyland and go back next year, that it's going to be the same, it won't be. If people come back to Wales next year, because they've been to the Garden Festival, they're not going to get that experience. I think it depends on why people came in the first place."

(Custodian, Historic Property)

Five interviewees thought that repeat visits would accrue to the area as a result of Garden Festival Wales:

"I think there were benefits, because it definitely brought a lot more people into Wales. I think we will get a lot of visitors back again and perhaps the awareness might just get many more visitors to Wales."

(Curator, Museum and Art Gallery)
“Most people tended to think that it was a nice area to explore around Gwent. I know there are people who will come back here, and they're going to go elsewhere as well. So I think it's been positive for the area generally.”

(Warden, Countryside Attraction)

The interviewees had evidence that visitors were attracted to South Wales by the Garden Festival (Figure 4.19). Thirteen managers had evidence as a consequence of operations at their attractions. This incorporated points that have been considered previously, such as market research at the attraction, involvement in coach itineraries and the bed-booking system in operation on site at some attractions. Three interviewees mentioned verbal feedback from their visitors:

“We had a lot of people who either came down specifically for the Garden Festival, or people who were drawn to the Garden Festival, but thought they would take in other sites of South Wales as well, and make it part of their holiday... You'd take the opportunity to chat to them. In fact they would prompt that they'd come down for the Garden Festival.”

(Warden, Countryside Attraction)
One interviewee who acknowledged that visitors had been attracted to Wales by the Garden Festival, made a cautionary point:

"I don’t think that it’s brought an enormous number of visitors to the area. It’s a case of recycling, an awful lot of local visits were made there - repeat visits from within the locality ... Numbers aren’t enough on their own, they have to be potential purchasers of the things you have to sell. The Garden Festival would have been successful if they’d brought in new potential purchasers of holidays in Wales and those aren’t necessarily local residents."

(Manager, Industrial/Craft Attraction)

The managers considered the distribution of the overall benefits to the local tourism industry, that they attributed to the Garden Festival. The interviewees stated a number of benefits, as listed in Figure 4.20. Some points were reiterated, such as increased awareness of Wales as a tourism destination, the encouragement of repeat visitors to Wales and promotional benefits:

"Ultimately the Garden Festival was to promote tourism in Wales. It was an agent of regeneration and an agent of promotion for the tourism industry and I personally feel that it did. In terms of long-term use and what’s there now, I don’t know, but for those six months I think that the tourism industry definitely benefitted."

(Marketing Officer, Industrial/Craft Attraction)

Other stated benefits included environmental improvements to the area and developments to the local infrastructure:

"It did return the Ebbw Vale Valley to something close to what it should have been to start off with. It did a lot of renovation work and true reclamation which was well worth while. I think it gave people a sense of community pride ... they had something sufficiently good to attract people from all over the country."

(Manager, Industrial/Craft Attraction)
"I think that it may encourage people to come back. What it did do, was encourage ‘tidying-up’ of bits of Wales, not just the Garden Festival site, but even the area around was dramatically improved ... It can only be an advantage, the better the facilities, the more likely to attract people in."

(Curator, Museum and Art Gallery)

"The first benefit of course was the big tidy-up that took place. I mean the approaches ... certainly the Heads of the Valleys, all the roundabouts, the nice stone walls and the planting. I mean that’s there for all time and that’s an obvious benefit and it’s improved the appearance of the roads."

(Senior Forest Ranger, Countryside Attraction)

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<thead>
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<td>Environmental improvement</td>
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<td>Improved infrastructure</td>
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<td>Employment in the local tourism industry</td>
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<td>Encouraged visitors to Wales in the short term</td>
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<td>An additional attraction</td>
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<td>Encouraged repeat visits to Wales</td>
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FIGURE 4.20 Interviewees' Perceptions of the Benefits to the Local Tourism Industry

Four interviewees stated that the creation of employment in the local tourism industry was a positive result of Garden Festival Wales, however they also expressed concern at the fact that this was only short term.
"The employment was a very nice break from the dole for a lot of people. I don't know what facilities are going to be permanent or what long term employment will arise on the site, that's the key question."

(Manager, Industrial/Craft Attraction)

"... the employees there, a lot of whom were really upset ... getting involved in the tourism trade, and suddenly it was over. They are quite spread through the community in the sense that they didn’t all come from Ebbw Vale. They are now trying to get into tourism, they’ve had a good background in some ways, but the economic situation isn’t such at the moment, that the benefits that they should have from it, can be reaped by them."

(Manager, Industrial/Craft Attraction)

Four managers were cynical as to the benefits to the local tourism industry, attributable to Garden Festival Wales. Their scepticism was apparent when they considered the distribution of any benefits:

"I’d say the benefits were very hard to quantify in exactly what benefit anyone did get from the Garden Festival, apart from the people who were being paid to do something - the artists, the contractors, who I suspect would make quite a lot of money doing things for the Festival organisers. I suppose that brings you back to that point again that I strongly suspect that the people who made some sort of financial or work benefit weren’t from South Wales."

(Curator, Museum and Art Gallery)

"Commerially, the revenue benefits must have been largely concentrated on those who were on the site itself ... It was intended to be an all-inclusive day out, you went there, had your food there and bought everything you require there, and that's the opposite spin-off. What it does is suck the trade in, rather than creating spin-off. I've had comments, from fairly small crafts people for instance, that the rentals required and the conditions imposed were such that they felt they couldn't participate..."
and that a lot of the retail companies on the site were companies with no base in the area.”

(Curator, Museum and Art Gallery)

One interviewee highlighted this point and explained why the distribution of benefits would have been unequal:

Because of the fact that you had to pay to be involved with Garden Festival Wales, and in the case of an attraction like us, owned by a Local Authority, you also had to have District Council permission, to be involved ... it means that some people who have benefitted slightly from Garden Festival Wales, have benefitted less than they would have, if they’d had either the money, or the go-ahead to actually have become more actively involved.

(Manager, Industrial/Craft Attraction)

All of the managers agreed that the distribution of any benefits would not have been equal. Many stated that this was the nature of the event:

"It can't be evenly spread in any sense, but that's not the fault of the Garden Festival, because it's not designed to benefit things in an even-handed way. It's meant to be a showcase really, a loss-leader to encourage people to do their own marketing ... The show organisers put the event on and advertise to bring in lots of people to that event, so that the exhibitors can benefit by the exposure they get."

(Manager, Industrial/Craft Attraction)

Interviewees mentioned other variables that affected the impact of Garden Festival Wales. These included a combination of geographical influences and distribution according to sectors of the local tourism industry. For example, it was perceived that the accommodation sector in the local vicinity would have gained from the additional trade generated by the Festival:

"I would have said that it was the hotels, B and B's, caravan parks that would have benefitted the most."

(Marketing Manager, Historic Property)
"There must have been some quite considerable benefits to the accommodation sector, I should imagine. A considerable number of bednights must be attributable to the Garden Festival. That would have been quite lucrative business for those who picked it up. In that sense it can't be equally distributed because it would have been distributed over a pretty tight area."

(Manager, Industrial/Craft Attraction)

Regarding the local tourism attractions, many interviewees considered that the positive impacts of the Garden Festival would have benefitted some more than others:

"I'm trying to think of a place that didn't benefit... small scale attractions. But then, they wouldn't want large scale group visits because that isn't their market."

(Marketing Officer, Industrial/Craft Attraction)

"Most of the big attractions tend to be from Glamorgan and Gwent. The coach companies picked out the obvious attractions, for their optional extras on their excursions... they picked out the impressive looking things, and the nationally known things, and homed in on them."

(Curator, Museum and Art Gallery)

"You would have to ask other operators, in the Gwent area, of the tourist facilities that are of general interest. We are specialist, we didn't expect any effect, we didn't find any effect and we weren't surprised... So in that sense, it wasn't even."

(Curator, Museum)

The variables that affected distribution and examples stated by the interviewees were also applicable to the distribution of the costs associated with Garden Festival Wales. Interviewees considered the costs to the local tourism industry that they attributed to the Festival. The managers perceived the negative impact of Garden Festival Wales in terms of either, financial or social costs as shown in Figure 4.21. A number of interviewees were very aware of the large financial cost involved:
"It was an awful lot of money to spend on a temporary attraction in Ebbw Vale."

(Marketing Officer, Industrial/Craft Attraction)

"It doesn't appear to have done very much, nothing very dramatic in tourism terms to give us much confidence that next year's going to be much better or that 1992 was a high water-mark in Wales' tourism - nothing like that, despite the fact that more money was spent on the promotion of tourism in Wales, by the Garden Festival in 1992, than any year ever, I should imagine."

(Manager, Industrial/Craft Attraction)

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FIGURE 4.21 Interviewees' Perceptions of the Costs to the Local Tourism Industry Attributable to GFW

Others considered the financial cost to the tourism attractions:

"The National Museum Marketing Department spent an awful lot of time in connection with the Garden Festival, that I wonder if it was well spent, whether they could have spent the time somewhere else at a lesser cost ... the other attractions they invested a lot of time and energy in trying to accommodate the Garden Festival to get a sideward effect, to produce leaflets, to make sure they didn't suffer ... that is probably a very real cost in terms of effort and concern."

(Curator, Museum)

One manager suggested that the financial investment in Garden Festival Wales could have been better allocated:
"The sheer, unbelievable sums that it cost ... I'm not just saying museums, there are lots of other similar organisations, if any of them had just a fraction of that sort of funding, they could all create something worthwhile, that would last at first five or ten years, perhaps with an ongoing benefit."

(Curator, Museum and Art Gallery)

The transient nature of Garden Festival Wales was mentioned in a negative context by many of the interviewees. In addition to the financial costs stated previously, the short duration of Garden Festival Wales was considered a contributory factor responsible for the social costs of the Festival. This was particularly apparent regarding short term employment:

"I am a little bit worried about the social impact because I knew people who were working there ... and their excitement at the time leading up to the opening of the event, was incredible, they were really firing on all cylinders ... and it ended so abruptly. An awful lot of them were left feeling, they'd tasted what they wanted to do, they wanted to be involved in selling Wales and having had the door opened for them it was being slammed shut again."

(Manager, Industrial/Craft Attraction)

"I don't get the impression from the people that I've talked to that there's really any spin-off for the people of Ebbw Vale. I was talking to some youngsters who worked there for a while, and their expectations were raised. If they worked there for very low money, and most of them did, at the end of the day there would be other jobs ...The Festival packs up, goes away, they're back on the dole and Ebbw Vale is still Ebbw Vale."

(Curator, Museum)

There was an inclination among all the interviewees to be more critical regarding the costs that they associated with Garden Festival Wales, because of its short operational life. There was much reference to lost opportunities:
"A lot of people's concern now is, you've got this site which is going to become run down in a few years time. After seeing the wonderful work that's gone into creating something quite special for six to seven months of the year, and later even that's crumbled beneath them, that's where the wastage would come in, not picking up the momentum and using that site for something special."

(Warden, Countryside Attraction)

"I think the whole idea behind the Garden Festival unfortunately stops too short, not just with this one but with Garden Festivals in general. I mean this one is going to be the last one anyway but I think that the problem with them is that they create something good, they involve the community in something that is undoubtedly beneficial and yet when it's over everything that comes after is such an anti-climax. Really, to have invested some of the money that was put into developing it, into ensuring that there was an ongoing thing afterwards."

(Manager, Industrial/Craft Attraction)

Finally, the interviewees reconciled their contradictory opinions and considered whether the benefits to tourism in South Wales attributed to Garden Festival Wales, outweighed the costs and difficulties associated with the event. The managers responses are outlined in Figure 4.22. In their final assessment the majority of interviewees (9/16) did consider the benefits to outweigh the costs:

"I'm sure it must have been good for lots of sections of tourism, whether it was B and B's in the area, or hotels, or ancient monument sites, or cafes, or whatever. It must have brought income into the area, even though I read somewhere that the numbers who came were much lower than expected, it still brought more people into the area than would have come. I'm sure, normally Ebbw Vale isn't known as the tourist centre of Wales."

(Custodian, Historic Property)
However, they continued to express their reservations throughout:

"I think the Garden Festival was a good thing, despite the fact that I’ve just said I’ve all these reservations, but my reservations are more to do with what they’re going to do after the Garden Festival, rather than the Garden Festival itself. I really do believe that it did more good than bad but I do think that something more should have been thought through as to what comes after Garden Festival Wales ... I wish that something had been done to ensure that its impact was more realistically permanent."

(Manager, Industrial/Craft Attraction)

"How many visitors did they attract? That’s got to be good ... hasn’t it?"

(Custodian, Historic Property)

Those interviewees who did not consider that Garden Festival Wales had been worthwhile ie. the costs had outweighed the benefits, were in little doubt:

"I haven’t as yet had any proof that the Garden Festival has significantly improved the tourism potential of Wales, particularly on a long-term basis, and certainly from our point of view we actually lost out financially, obviously with the visitor figures being down ... we lost quite badly ... we haven’t seen any benefit."

(Curator, Museum and Art Gallery)

"It wasn’t meant to be a tourism event, it’s an economic regeneration event and land reclamation event, but certainly as a tourism event it wasn’t worth doing at all. There are far more effective means of achieving a similar end or perhaps a better targeted end, in tourism. It’s for others to say really, if it did a reasonable job in terms of
economic development. I think the jury is still out on that one and likely to stay out for a very long time."

(Manager, Industrial/Craft Attraction)

Five managers were less definitive:

"I have mixed feelings about it, part of me say, yes it's great, it's done a lot for the Welsh image, other parts of me say ... well, you know when you hear the costs of everything. I just have very mixed feelings about it, I think some of the costs were incredibly high."

(Curator, Museum)

"You can be very negative and say what was all the money spent for, why couldn't we inject the money into the country for a leisure park, that gives people ongoing enjoyment, or whatever. That's one view, the other view? Yes, it was employment, it gave someone that go, maybe the impetus to do something on their own afterwards. I don't think you can generalise ... it's a very, very personal view."

(Custodian, Historic Property)
CHAPTER 5.

ANALYSIS

"How many visitors did they attract? That's got to be good ... hasn't it?"

(Custodian)
It was expected that Garden Festival Wales would have a positive impact on the permanent, local, visitor attractions used as a basis for the research. Analysis of the research results and incorporation of the relevant secondary data, will test the validity of the hypothesis, in terms of the stated criteria ie the actual benefits and the perceived benefits.

EVIDENCE OF ADDITIONAL VISITORS

Criteria used to consider the actual benefits included additional visits and increased numbers to the attractions in question. To attract their target of 2,000,000 visitors to the Festival, G.F.W. Ltd. adhered to a market-led strategy. It was essential that Ebbw Vale attracted long distance visitors and encouraged repeat visitors. Between 330,000 and 500,000 domestic tourists were expected. It was proposed that the visitor attractions would benefit from additional visits made by these staying visitors initially encouraged to Wales by the Festival.

The results acquired from both the visitor survey and host survey indicate that Garden Festival Wales was considered to be a significant event in South Wales. A large percentage of respondents interviewed at the visitor attractions thought that more tourists would be attracted to South Wales during the Festival period. The majority (13/16) of the managers interviewed for the host survey had evidence as a consequence of their own operations, that visitors were attracted to South Wales by Garden Festival Wales. This evidence suggests that Garden Festival Wales established itself as a credible additional attraction to the tourism product in South Wales.

There were a number of influential factors on visitor numbers at the attractions, over which the managers had little control eg. the weather, the recession and access problems. These factors tended to have a negative impact on visitor numbers. The factors that the managers could influence included internal changes to the product and new approaches to marketing. Garden Festival Wales was relevant to both categories. It was taking place in South Wales and the managers had no control over this, but they could take action to accommodate the Festival’s existence.
The Festival was successful in achieving its target of 2 million visitors (W.T.B., 1993a). The Garden Festival Wales exit poll commissioned by the W.T.B. and carried out by the Golley Slater Group (G.S.G., 1992) reports the results of interviews undertaken by Festival staff. Visitors were interviewed during May and August 1992 as they left the Festival site. Festival exit poll results report that nearly half of the visitors were from outside Wales and the majority (80%) of these stated that the Festival was the main reason for their visit. Thirty-five per cent of these visitors were staying for at least 2 nights.

The results of the visitor survey show that just over 10 per cent of the respondents interviewed at the visitor attractions would not have visited Wales had it not been for the Garden Festival, and therefore would not have visited the attractions. This appears to be a significant number of visitors over this period.

There is further correlation between the profile of the staying visitor reported in the Festival exit poll and the respondent staying overnight, interviewed at the visitor attractions. Visitor survey results show that a significant number of overnight stayers were located in accommodation in Cardiff, Newport, Brecon, Abergavenny and Monmouth. The utilisation of serviced accommodation by these respondents was greater, when compared to 1991 figures (W.T.B., 1993a). It is stated in the Festival exit poll report that over a third of staying visitors interviewed at Garden Festival Wales were staying in the Gwent area. Brecon and Cardiff were also noted to be popular locations. Two-thirds of these visitors were staying in paid accommodation.

These facts support the argument that additional visits were made to other attractions by visitors who came to Wales as a consequence of Garden Festival Wales. The results of the host survey support this statement but are more complex. The opposite effects of Garden Festival Wales on total visitor numbers at the attractions are also reported.

The interviewees identified changes that had occurred within particular market segments. In terms of the casual/domestic visitor the
managers reported a decrease from within the local market but an increase in visitors who had travelled greater distances.

"What actually happened with the Garden Festival in the main was, alright it brought in a number of people from outside the region, but it also mopped up the internal market within the region."

(Curator, Museum and Art Gallery)

Schools and coach parties were the other visitor attraction markets influenced by the Festival. The managers of attractions which experienced a decrease in school visits attributed this to the Garden Festival. These results are expected as the Festival Company placed great importance on this particular market segment. They implemented an 'educational strategy' which aimed to attract 100,000 educational visitors (G.F.W. Ltd., 1989). This programme surpassed its target, with 160,000 school children and teachers actually visiting the Festival (G.S.G., 1992).

The effect of the Garden Festival on the coach party market varied with each attraction. The Festival was considered to be responsible for an increase in this market at some attractions but responsible for a decrease in numbers at others. There was no definitive pattern regarding this in terms of resource type.

"Coach parties compensated for the lack of schools which we know was directly attributable to the Garden Festival."

(Marketing Officer, Historic Property)

The combination of these changes attributable to Garden Festival Wales, is similar to that reported to have taken place in the Merseyside area during the Liverpool International Garden Festival (Wilsher, 1985). A substitution of visitors took place at some attractions, resulting in a negligible net impact on their visitor numbers. Further investigation of the results, within these criteria, is required.
THE DISTRIBUTION OF ADDITIONAL VISITORS

In their 1992-1993 Annual Report, the W.T.B. point out that with a large number of attractions of such diversity in Wales, it is difficult to identify clear regional differences in visitor number movements. However, they state that a significant number of attractions in North and West Wales experienced a fall in visitor numbers, while in South and Mid Wales many attractions reported an increase in numbers.

The official figures for individual attractions have been reported in the 1993 W.T.B. Factsheet, Visitors to Tourist Attractions in Wales (1992). This presents statistics for 1992 compiled from annual returns made by individual operators. The experiences of the attractions included in the sample and listed, were mixed. Changes in visitor numbers varied among these attractions in three of the four categories ie. historic properties, museums and art galleries and countryside attractions. The three industrial/craft attractions all experienced an increase in visitor numbers. Comparison of these official figures with the reports given by the managers in the host survey showed consistency. The managers were fairly accurate in their assessment of any changes in overall visitor numbers.

Although just over 10 per cent of the respondents interviewed at the visitor attractions were in Wales as a result of the Garden Festival, the distribution of these visitors among the attractions was unequal. The industrial/craft attractions benefitted from these additional visitors much more than the attractions in other resource categories. This positive impact diminished in significance from the historic properties to the countryside attractions and museum and art galleries, respectively.

Each attraction category exhibits a different visitor type. The industrial/craft attractions rely heavily on the overnight stayer to Wales as opposed to the more local market. The local market becomes much more important to the historic properties and countryside attractions. It is fundamental to the survival of the museums and art galleries. The domicile of respondents' in the visitor survey exhibits a large representation from the counties of Mid-Glamorgan and Gwent.
This is evidence of the importance of the local market to many of the visitor attractions. As outlined previously, the Garden Festival affected the local market and holiday market in different ways and affected the attractions accordingly depending on their market breakdown.

There is further evidence to support this assertion. Although market research was undertaken at few of the visitor attractions, all the industrial/craft attractions were amongst those where it did occur. On the basis of this market research, two industrial/craft attraction managers said that nearly half of their visitors had also visited the Garden Festival. The results of the visitor survey show that over two-thirds of the respondents had not visited Garden Festival Wales at the time of interview. It appears that a higher proportion of visitors at the industrial/craft attractions had also visited the Festival when compared to visitors at the heritage sites, museums and art galleries and countryside attractions. It is deduced that there is a greater similarity between the profile of visitors attracted to Garden Festival Wales and those attracted to the industrial/craft attractions, therefore it was these attractions who gained in terms of additional visits.

"... attractions of more general interest there was a lot in it for them ... but my feeling was always, we're not going to tap into the extra market too much."

(Curator, Museum and Art Gallery)

This interpretation of the results reinforces Ritchie's argument (Ritchie, 1984) that development may favour the region as a whole but it may also have a negative impact on particular individuals and firms in terms of competition and diverted trade.

**IMPACT ON VISITOR EXPENDITURE**

The higher expenditure per head criterion is difficult to assess with any accuracy, as there are no figures available relating to the off-site spending of visitors to Garden Festival Wales. It is stated in the Garden Festival Wales exit poll report that the overall profile of visitors was strongly biased towards the older age bands and that one
in five visitors were in private parties with children. There is no indication as to the socio-economic profile of these visitors. Only a small percentage of the visitors interviewed at the attractions were of the opinion that the Garden Festival would bring more money to South Wales.

Secondary sources suggest that Garden Festival Wales did contribute to an increase in expenditure by holidaymakers. The W.T.B. state that for Wales as a whole the volume of holiday business in 1992, measured by the number of trips by U.K. holidaymakers and the number of nights spent in Wales was virtually identical with 1991. The number of trips spent in South Wales increased by 8 per cent and the number of nights by 4 per cent. The W.T.B. attributes this to the impact of Garden Festival Wales in attracting staying visitors (W.T.B., 1993 a).

Expenditure by holidaymakers increased by 7 per cent (£55 million) to an estimated figure of £825 million. There was a noticeable growth in expenditure in Mid and South Wales, but a slight fall in North Wales.

The managers considered any potential benefits attributable to the Garden Festival and the distribution of these among the local tourism industry. It was perceived that by the nature of the event, any revenue benefits would have been unequally distributed among the locality. In agreement with the W.T.B. (W.T.B., 1993 a), the managers perceived that any increased expenditure by visitors to Garden Festival Wales, would have been concentrated on the accommodation sector.

"A considerable number of bed-nights must be attributable to the Garden Festival. That must be quite lucrative business for those who picked it up."

(Manager, Industrial/Craft Attraction)

The managers were sceptical about any revenue benefits generated. Concern regarding the financial costs in terms of those associated with the staging and operation of the Festival and the financial costs to the visitor attractions who tried to accommodate its existence, was also apparent. Their concerns were justified. A near £10 million deficit on Garden Festival Wales was reported (Western Mail, 1993). It was
reported that the Victoria Partnership, set up to handle the disposal of the Festival's assets, had paid back only £500,000 to its sponsors and that Blaenau Gwent Borough Council was owed much of the debt.

"It was an awful lot of money to spend on a temporary attraction in Ebbw Vale."

(Marketing Officer, Industrial/Craft Attraction)

It appears that Garden Festival Wales did generate additional visits, though the distribution of the visitors was unequal amongst the visitor attractions. There is no evidence to suggest that the attractions which benefitted from additional visitors as a result of Garden Festival Wales, also benefitted from any greater expenditure per head by these visitors.

COORDINATION

Other criteria termed 'actual benefits' were those associated with the impact of Garden Festival Wales on the marketing activities of the visitor attractions. Once again these were tangible and mainly concerned with economics. Garden Festival Wales was perceived as a significant event taking place in South Wales. Prior to the opening of the Festival, the majority (13/16) of managers expected that it would, in some way, affect business at their visitor attractions. Overall, either they reacted to this expectation accordingly, or measures were undertaken by their respective 'umbrella' organisations.

It would appear that the potential impacts of Garden Festival Wales prompted the managers or their 'umbrella' organisations to coordinate their efforts to some extent. The G.A.T.A. 'Passport to Gwent' scheme was an example of an initiative instigated by the prospect of Garden Festival Wales. This encouraged the Operators in G.A.T.A. to work together. G.A.T.A. itself was already in existence and not a consequence of the Garden Festival. However, consultation outside of this scheme was limited. Although all of the attractions were represented on the Festival site, there was a varying amount of consultation between the managers of the attractions, their 'umbrella' organisations and the relevant local authorities, regarding this. A 'top-
down' approach was reported by many of the managers, in particular those of the historic properties. In many cases the interviewees were informed after the decisions had been made. Some were not informed by their seniors.

Regarding the decision making processes associated with the operation of Garden Festival Wales, the majority (10/16) of the managers would like to have been given greater opportunity for involvement. They expressed disappointment about what they considered to be, inadequate coordination. Data from the host survey suggests that the 'umbrella' organisations represented the managers in this context. This typifies the 'top-down' approach mentioned above.

"We weren't consulted in any meaningful sense about how the event should take place."

(Manager, Industrial/Craft Attraction)

This lack of coordination and the desire for greater involvement reported by the managers, suggests that they were aware of the need for greater coordination within the local tourism industry. There is no evidence of any moves being taken towards the development of new consortia or a professional tourism network.

"One thing that the Garden Festival showed really was that there's scope for quite a lot more cooperation than is going on at the moment ...."

(Manager, Industrial/Craft Attraction)

**APPROACH TO MARKETING**

The results suggest that Garden Festival Wales did encourage the visitor attraction managers, or their 'umbrella' organisations to review their existing approaches and implement new techniques. All of the visitor attractions were involved in promotional campaigns directly associated with the Festival. In addition to this, indirect measures were taken at some attractions which utilised the existence of the Festival but would have occurred regardless. The effectiveness of the measures
taken as a consequence of the Festival, and in some cases in cooperation with the Festival, is less positive.

As previously stated, nearly all of the visitor attractions were represented at specific outlets located on the Festival site. Promotional leaflets were distributed from these outlets to potential visitors of their attractions. The managers could not judge the effectiveness of this promotion, but they were sceptical as to its success. The results of the visitor survey support this scepticism. Only 1.1 per cent of the visitors interviewed at the visitor attractions learned of the attraction at Garden Festival Wales. Also promotional leaflets distributed by means other than the Festival did not feature significantly in visitors’ responses. However, local communication channels and word-of-mouth recommendation were of major importance.

The countryside attractions were involved in a Forest Enterprise publication, produced as a result of Garden Festival Wales. A competition was included in this as a promotional tactic. Judging by the response to this competition, the managers of the countryside attractions did not consider that the publication had been effective in its purpose.

The most complex campaign involving the managers and operating in conjunction with Garden Festival Wales, was the ‘Passport to Gwent’ scheme. This involved Garden Festival Wales and nearly half of the visitor attractions in the sample. The G.A.T.A. promotion was a carefully coordinated campaign and was designed to encompass the positive advantages that the Garden Festival had to offer, particularly in terms of its large promotional budget and visitor targets.

As a result of the greater distance from large centres of population, in comparison to previous garden festivals, it was essential that Garden Festival Wales attracted car owners. Potential visitors were categorised by the Festival Company in terms of drive-times and specific catchment areas were targeted for promotion purposes. The Festival Company undertook an intensive promotional programme to raise awareness and encourage visitors to the Festival. This included a nationwide media campaign, necessitating more costly methods of
communication. These circumstances were known to the G.A.T.A. members and they anticipated that should the Festival Company be successful in achieving its targets they would benefit as a result of the 'Passport to Gwent' scheme.

The car as a mode of transport for visitors is of utmost importance to the attractions. This is confirmed by the visitor survey. The emphasis of the Garden Festival Wales promotional campaign is also reflected by the results to the visitor survey. The majority of visitors at the attractions learned of the Festival via these more costly communication channels. The Festival exit poll report indicates that the majority of visitors to the Garden Festival, from outside Wales travelled by car and that the South West and Midlands jointly accounted for 25 per cent of all visitors.

Despite these facts, the effectiveness of the 'Passport to Gwent' scheme was disappointing. The managers of the visitor attractions involved, considered that the initiative had been unsuccessful and had not had the expected impact. Once again, the results of the visitor survey and how the respondents learned of the attractions are relevant.

The 'coach itinerary' was a marketing technique operated in association with Garden Festival Wales. This was deemed to be more successful by the interviewees but involved only four attractions in the sample. This is a reflection of the fact that the manager had no control over the Coach Operators' decision and could only try to influence it. At some attractions an increase in the coach market segment contributed to an overall increase in visitor numbers at the attractions. This was a consequence of involvement in coach itineraries. Other consequences were less apparent as they were absorbed into a substitution effect.

"The coach companies picked out the obvious attractions, for their optional extras on their excursions ..."  
(Curator, Museum and Art Gallery)

Over a third of visitors to the Garden Festival arrived by coach. The majority of those who had travelled from the South West travelled by
Nearly one in three visitors were reported to be on a group excursion (G.S.G., 1992).

The visitor survey highlights the fact that few of the visitor attractions were in a position to benefit from these coach groups or were involved in itineraries associated with the Garden Festival. An insignificant number of respondents were at the attractions in a group of more than 15 people or categorised themselves as a party. Only a small percentage of the visitors travelled to the attractions by coach. Just over 8 per cent of the overnight stayers interviewed were on an 'all-inclusive holiday' and less than half of these tours included admission to the Garden Festival.

The evidence suggests that the Garden Festival did encourage the visitor attraction operators to review their existing situation. It did encourage them to actively market themselves on both an individual and collective basis and it also provided a promotional channel to do this. However, for a number of reasons the measures taken as a consequence of the Garden Festival were not successful.

Although Garden Festival Wales was successful in achieving its visitor targets, the Festival exit poll report states that between May and August, 45 per cent of the visitors came from within the core Glamorgan and Gwent catchment. In the first month, Gwent residents accounted for a third of all visitors but this proportion lessened as the Festival progressed. The level of repeat visiting was high and overall 24 per cent of visitors were on a repeat visit (G.S.G., 1992). On consideration of these facts it becomes more clear why the promotional measures taken by the attractions were largely unsuccessful. There was a considerable amount of wastage in that the communication was received by local people who were already aware of the visitor attractions in the area.

"It's a case of recycling, an awful lot of local visits were made there - repeat visits from within the locality ... Numbers aren't enough on their own, they have to be potential purchasers of the things you have to sell."

(Manager, Industrial/Craft Attraction)
In the Garden Festival Wales exit poll (G.S.G., 1992) nearly two-thirds of the visitors from outside Wales were on a day trip. If they had travelled to visit the Festival it is unlikely that they would have had extra time to visit other attractions in the area. As stated in the visitor survey results, it appears that representation of day visitors at the attractions is less than expected.

"My impression was that we'd get loads of day visitors and they would spend the day at Ebbw Vale and then they'd go home afterwards and we wouldn't see any of the spin-off."

(_curator, Museum and Art Gallery)

**PERCEIVED BENEFITS CRITERIA**

The criteria used to assess the perceived benefits of Garden Festival Wales were impacts that tended to be long-term and generally more difficult to quantify. Much emphasis was placed on the Festival as an agent to achieve such impacts ie. image improvement of the area and increased awareness among potential visitors, consequently encouraging repeat visits and positive word-of-mouth recommendation. In this respect, the priorities attached to Garden Festival Wales were similar to those of the Glasgow Garden Festival (1988).

The results of this research complement the assertions made by the W.T.B. (1992). In their official journal 'Tourism Wales,' they stated that Garden Festival Wales did have a positive impact on visitor perceptions of South Wales.

**IMPACT ON IMAGE AND AWARENESS**

The results of the Festival exit poll and the visitor survey are compatible. Nearly one-third of the overnight stayers (visitor survey) report that their image of Wales had changed for the better as a result of their visit. A significant number of visitors at the attractions thought that Garden Festival Wales helped to improve and benefit the image of the region and increased people's awareness and knowledge of the region. In the Festival exit poll (G.S.G. Ltd., 1992), one-third of
visitors from outside Wales had a more favourable image of Wales. The main reasons given for this change were the beauty and appearance of the landscape and the apparent improvements that had taken place. Forty-seven per cent found the environment better than they had expected (G.S.G., 1992).

"If it brought people in for the first time, then it's bound to have altered their image. By and large they have a pretty old fashioned impression of the South Wales Valleys."

(Manager, Industrial/Craft Attraction)

Overall, the reaction of the managers was positive regarding the Festival's contribution to the physical tourism product in South Wales i.e. the environmental improvement to the area and developments to the local infrastructure. Some even considered it advantageous to have an additional attraction in the marketplace that would attract new visitors to the area. The Festival did attract new visitors from outside Wales to the locality and although two-thirds of these were on a day-trip (G.S.G., 1992) they would have formulated an initial impression of Wales. Over three-quarters of the managers thought that the Festival would have challenged visitors' perceptions of Wales, but they expressed caution in that such perceptions were subject to influences such as length of stay and the weather.

It is interpreted that first-time visitors to Wales are often unaware of the tourism product on offer in Wales and frequently it is not as they expected. The Festival did contribute to image improvement in an indirect way. It was an addition to the overall tourism product in South Wales which encouraged people to visit the area. On making a visit many visitors' perceptions were changed in a positive way. In turn, this increased their awareness.

"In an indirect way, Wales was promoted, but not in a direct way ... it encouraged people to come and stay in the area and see other things."

(Marketing Officer, Industrial/Craft Attraction)
The compatibility of the visitor survey and Festival exit poll report reinforces this point. Both referred to visitors to Wales, but the visitor survey included those who had not visited the Garden Festival and would have visited Wales regardless of the Festival. Their perceptions of Wales were altered nonetheless.

The host survey results take the analysis one step further. The managers considered the type of image portrayed by the Festival and questioned whether this was beneficial within the context of the product in Wales and previous and existing marketing campaigns for the area. This becomes more relevant in terms of potential visitors to Wales as opposed to the actual visitors referred to above.

Overall, the managers did not think that the Garden Festival portrayed a Welsh identity. It was perceived that the Garden Festival had too strong an identity of its own. A combination of these two factors led the majority (14/16) of the managers to the conclusion that Garden Festival Wales as a lone entity, projected an image to potential visitors that was unfavourable.

"It's a Garden Festival identity rather than a locality."
(Curator, Museum)

The advertising campaign undertaken by the Festival Company included a nationwide media campaign. As stated previously, the visitor survey highlighted the importance of costly communication channels in creating awareness of the Garden Festival among potential consumers. The Festival exit poll clarifies this as the principal sources of awareness were given as television advertising and press advertising. The managers' opinions of the representativeness of the coverage in the media varied but over three-quarters of them considered that the Garden Festival would have increased awareness of Wales as a tourism destination among the U.K. market.

It appears that the Garden Festival was less successful in the image that it portrayed to the potential U.K. market. It seems that the image was not easily identifiable with Wales. The Festival did create
such opinions were only attributed to the U.K. market. In terms of the overseas market, the managers did not consider that the Garden Festival as an individual entity was significant enough to influence this market. The Garden Festival Company recognised this from the outset as overseas visitors accounted for only a very small proportion of targeted visitors. There is no information available stating whether this target was actually attained. Results of the visitor survey show that 12.6 per cent of the visitors interviewed at the attractions were overseas. This figure is higher than that of overseas trips to Wales as a proportion of all trips (W.T.B., 1993 a). This is not unexpected as there is a greater dependence on the holiday market as regards overseas trips. The time of interviews incorporated the holiday season and visitor attractions contribute to the product utilised by visitors on holiday. To create awareness among the overseas market, greater emphasis is placed on the whole product as opposed to individual elements.

"I'm sure that the Garden Festival was an extremely pleasant discovery, that it was on ... rather than that's why they came." (Curator, Museum and Art Gallery)

IMPACT ON WORD-OF-MOUTH RECOMMENDATION AND REPEAT VISITS

The implications of the Garden Festival's impact on image and awareness should become apparent in the form of word-of-mouth recommendation and repeat visits to the locality. It has been suggested that the visitors who came to South Wales left with a changed perception of the area. Dependent on whether this was a positive or negative change, it should influence the recommendation accordingly. The managers were aware of this, as stated previously, and were therefore unsure whether the word-of-mouth recommendation generated would be beneficial. It would be wholly dependent on the individual experience of the visitor. This point was also relevant to the likelihood of repeat visits.
Ritchie (1984) acknowledges the difficulties in quantifying such impacts. He recognises that negative tourism and commercial outcomes do exist. The apparent caution of the managers in assessing these impacts illustrates Ritchie's opinion.

It is acknowledged in this study that the experiences of individual visitors would have differed, but the evidence suggests that many visitors who came to South Wales as a result of the Garden Festival, left with a positive impression of the wider tourism product available in South Wales. This in turn should have a beneficial effect on word-of-mouth recommendation and encourage repeat visits to the area. The Festival exit poll report claims that nearly two-thirds of visitors from outside Wales said that the Festival had encouraged them to revisit Wales (G.S.G., 1993). The results of the visitor survey show that the majority of overnight stayers stated an intention to visit South Wales again.

In the mission statement of the W.T.B., the need to sustain and promote the culture of Wales is highlighted (W.T.B., 1993 c). The need to establish a Welsh identity within the industry, through the promotion of the cultural and heritage assets available, has been continually stated by the W.T.B.

The objective of the W.T.B.'s image-building advertising in the U.K. is to enhance awareness of Wales as a holiday destination and to improve the image and perceptions which are held of Wales. This is aimed at potential visitors in higher spending categories. The W.T.B. suggest in their Annual Report 1993 that new customers have little perception of the outstanding scenery in Wales and their image-building campaign aims to rectify this problem. This campaign is relatively new but has been incorporated into the Board's existing marketing strategy.

Within this context, the evidence suggests that Garden Festival Wales did complement the existing marketing strategy of the W.T.B., in that it encouraged visitors to Wales. The majority of these visitors left with a greater knowledge and, consequently, a more favourable impression of the area. However, in terms of potential visitors, Garden Festival
Wales did not project an image compatible with the W.T.B. campaign, as the Festival had too strong a corporate identity of its own. This was recognised by the majority (14/16) of the managers and they considered this lack of Welsh identity to be unfavourable. The results suggest that this is why seven managers perceived the Garden Festival image to be non-representative of W.T.B. policy.

"I think in a way, it became a thing slightly in isolation from what was being done by the W.T.B."

(Manager, Industrial/Craft Attraction)

Seven managers were unsure about the Festival image in terms of W.T.B. policy. This in itself reflects the complexity of the issue, in that the Festival did indirectly have a beneficial impact on image and awareness as a result of the actual visitors, but a potentially negative impact on possible visitors.

GARDEN FESTIVAL WALES AND THE LOCAL TOURISM

LABOUR FORCE

The final criterion for assessment was that associated with the training of people involved in the industry. This affects the quality of the overall tourism product. It also has implications for information dissemination of the product on offer, which incorporates the visitor attractions.

The Festival Company stated in their factsheets (G.F.W. Ltd., 1992), made available after the closure of the Festival, that they employed over 800 people of whom over 500 had previously been unemployed. The workforce was largely local. All of the Company employees received training which included nationally recognised qualifications eg. City and Guilds 9294 and National Vocational Qualifications. The W.T.B.'s 'Welcome Host' customer care training programme was completed by Company employees. The Garden Festival was the largest training centre for this scheme in 1992. In the Festival exit poll report (G.S.G., 1992) it is stated that 97 per cent of visitors to the Festival rated the attitude of staff as good or excellent.
These facts are positive. However, the creation of employment by the Garden Festival was acknowledged by only a small proportion of respondents interviewed at the visitor attractions. Only one quarter of the managers perceived job creation to be a beneficial impact of the Festival. This was a reflection of the short operational life of the Festival and the reality of the situation. The managers considered the short-term employment generated by the Festival to be at social cost in the long-term.

"... I knew people who were working there ... they wanted to be involved in selling Wales and having had the door opened for them it was being slammed shut again."

(Manager, Industrial/Craft Attraction)

It would appear that the managers were unaffected by the employment and training initiatives associated with the Festival's operation. In the study commissioned by the Calouste Gulbenkian Foundation, the University of Newcastle Upon Tyne investigated the employment benefits of the first four garden festivals, as part of the longer term social gains to the local communities involved (O'Toole and Robinson, 1990). It was concluded that tangible benefits to the local communities were disappointing. Within this context, the results of this study suggest that Garden Festival Wales did not learn from the experiences of previous British garden festivals.

COSTS AND BENEFITS RECONCILED

From analysis of the actual and perceived benefits, it is apparent that the Garden Festival had beneficial impact on the local tourism industry, but this impact was modest in terms of what was expected. Similarities exist between the results of this study and those of the Festival Impact Study carried out after the Gateshead Garden Festival (Huntley Associates, 1990). The positive impact on tourism in the North East was attributed to the fact that more visitors were attracted to the area. The visitor survey provides tangible evidence that visitors were attracted to South Wales by Garden Festival Wales. The evidence suggests that not all of the stated criteria which provided the basis for assessment, ultimately occurred. Those criteria that were considered
beneficial impacts of the Festival were attributable to the new visitors generated by the event.

The disappointment of the visitor attraction managers who represented the local tourism industry, is shown in their final assessment. Overall, only half of the visitor attraction managers considered Garden Festival Wales to have been a worthwhile event.

"I have mixed feelings about it ...."

(Curator, Museum)
CHAPTER 6.

CONCLUSION

"What we are today comes from our thoughts of yesterday, and our present thoughts build our life of tomorrow."

(The Buddha)
The circumstances under which each of the British garden festivals operated have varied considerably. Consequently, the priorities accorded to each festival have differed, and the response to local considerations has influenced the emphasis to be placed on different aspects of policy objectives. As a result, evaluative studies of previous festivals have tended to consider each festival as a separate entity. This study is no exception to this pattern and it too is unique in that it cannot be repeated.

G.F.W. Ltd. aimed to meet all of the basic parameters as stated by the D.o.E. (c.f. 3), but placed priority on improving the image of the area, which in turn would act as a primer for more rapid economic regeneration.

This thesis has described attempts to determine the realisation of some of the objectives of Garden Festival Wales. It was postulated in this study that Garden Festival Wales and the increased visitor numbers attributable to the event, would have a beneficial affect on the local tourism industry. The impact of the Festival on other local, permanent, visitor attractions would be representative of this. The research obtained an overall consensus of the impact of Garden Festival Wales on other local, permanent, visitor attractions.

The criteria for assessment of the impact were the 'perceived' and 'actual' benefits attributable to Garden Festival Wales. The occurrence of all of the stated criteria, expected as a consequence of the Festival, is not supported by the evidence presented in this study. The findings reinforce Ritchie's argument (1984) that potential for negative impacts does exist. It is concluded that, while Garden Festival Wales had a beneficial impact on the local tourism industry, this impact was modest in terms of what was expected.

The perceived and actual benefits to the local visitor attractions attributable to Garden Festival Wales were the result of the new visitors to the area generated by the event. These positive impacts were short-term.
The Festival established itself as a temporary, credible, additional attraction to the tourism product in South Wales and achieved its target of 2 million visitors. Some of the visitor attractions surveyed did benefit from additional visits made by the visitors who were attracted to Wales by the Garden Festival. The distribution of these additional visitors was not equal, in that the industrial/craft attractions benefitted more than the visitor attractions in other resource categories. The positive impact diminished in significance from the historic properties to the countryside attractions and museums and art galleries, respectively.

A substitution effect similar to that reported to have taken place in the Merseyside area during the Liverpool International Garden Festival (c.f. 15) was also observed. Substitution of particular market segments took place which resulted in a negligible net impact on visitor numbers.

There is no evidence to suggest that the attractions which benefitted from additional visitors as a result of Garden Festival Wales also benefitted from any greater expenditure per head by these visitors.

The impact of Garden Festival Wales on image and awareness should become apparent in the form of word-of-mouth recommendation and repeat visits. It has been observed that many visitors who came to South Wales as a result of the Festival left with a favourable impression of the tourism product available in the area. It is expected that this will have a positive effect on word-of-mouth recommendation and will encourage repeat visits.

Other expected beneficial impacts were not fully realised by Garden Festival Wales. These benefits included impacts such as image enhancement, increased awareness, positive coordination and effective marketing activity. Such impacts have been given less attention in the evaluation of previous British garden festivals.

In an indirect way, Garden Festival Wales did have a beneficial impact on image and awareness as a result of the visitors it prompted to come to Wales. The Festival encouraged first-time visitors to the area and,
on making a visit, many visitors' perceptions were changed in a positive way. Their awareness of the tourism product in Wales was increased.

However, the Festival could have had a potentially negative impact on possible visitors. The image projected by the Festival to the potential market was not deemed successful as it was not considered representative of the overall tourism product on offer in Wales. The intensive promotional campaign (c.f. 40) raised awareness of Wales as a destination, but the Festival product was not one that portrayed a Welsh identity. Within the context of the Welsh tourism product, the Festival image was not compatible and was not consistent with the W.T.B.'s image-building advertising in the U.K.

Garden Festival Wales did complement the W.T.B.'s existing marketing strategy but only in that it encouraged visitors to Wales and thus increased awareness among these visitors. This was not the case in terms of potential visitors who were exposed to the Festival advertising but did not visit Wales. The Festival, as an individual entity was not significant enough to influence the overseas market.

The expectancy that Garden Festival Wales would affect business at the visitor attractions prompted the managers or their 'umbrella' organisations to coordinate their efforts. There was a tendency for the coordination to be reactive rather than proactive. The coordination that did occur was considered to be inadequate by the managers. A 'top-down' approach was reported by the managers and, consequently, a desire for greater involvement was expressed by them. This suggests that among the tourism industry in Wales there was scope for greater cooperation regarding the Festival.

Garden Festival Wales did encourage the visitor attraction operators to actively market themselves on an individual and collective basis, and it also provided a promotional channel to do this. All of the visitor attractions were involved in promotional campaigns as a consequence of the Festival. The effectiveness of these measures varied, and was not considered to be positive overall. The uncertainty shown by the managers regarding the effectiveness of their promotions highlights
the need for further research and efficiency control related to marketing activities.

The visitor attractions were largely unaffected by the employment and training initiatives associated with the Garden Festival Wales. Although the employment generated for the duration of the Festival was positive, the fact that this employment was only short-term was considered by the managers to be at social cost in the long-term.

PA Cambridge Economic Consultants (1990) stated that, given total costs, the individual benefits attributable to the first three garden festivals were quite modest. Garden Festival Wales was the last in a series of garden festivals and it had the advantage of the experiences of its predecessors. There was also a regeneration strategy for the area in existence. However, the outcome of Garden Festival Wales is similar to that of the first three festivals.

There are a number of possible reasons why the impact of Garden Festival Wales was not as beneficial as had been expected. G.F.W. Ltd. pursued a market-led strategy to achieve Company objectives. An intensive promotional programme was aimed at specific catchment areas and market segments. However, there was overlap between these markets and those on which the visitor attractions were reliant. The Festival was, therefore, a competitor for the visitor attractions in terms of the local market, and diverted this trade. The extent to which the attractions were dependent on particular markets had a bearing on how they were affected by the Festival.

This has been a consequence of each of the garden festivals. The nature of the event, particularly those notably market-led i.e. Glasgow and Ebbw Vale, necessitates market overlap in order to meet short-term objectives.

Garden Festival Wales did attract a large number of visitors from the local area. This provides one explanation for the apparent inefficiency of the promotional techniques undertaken by the visitor attractions as a result of the Festival. There was a considerable amount of wastage in
that much of the communication was received by local people who were already aware of the visitor attractions in the area.

Another possible reason why Garden Festival Wales was not as beneficial as had been expected was that the corporate image of the Festival was very distinct, but it was not compatible with the image-building objectives of the local tourism industry. However, this was partly countered by the fact that the Festival did attract first-time visitors to the area which raised their awareness of the overall tourism product on offer in Wales.

Another reason is highlighted by the argument of Ritchie and Beliveau (1974) who stated that, to be successful, it is necessary for the event in question to be a constantly evolving product, with a long term perspective that has strong local support and a continuing organisational structure. The short operational lifetime of Garden Festival Wales guaranteed that it was not possible for it to become an established part of the product in South Wales and attract new visitors on a regular basis.

The previous British garden festivals attempted to be responsive to local circumstances, but the scale of the events and the relatively short lead times resulted in the festivals being developed in an isolated way. Garden Festival Wales was also an example of this and, consequently, the development of a synergistic relationship between the Festival and the existing, permanent, tourism industry in the area was not fully developed.

Currently, there are no plans for any future garden festivals in Great Britain. However, the issues addressed in this study, and its findings, are relevant to the concept of festivals and special events in a broader context.

Regarding the wider application of festivals and special events as part of tourism product development and economic regeneration, the following recommendations are made:
The festival should be compatible and incorporated within the 
tourism product already in existence in the locality.

A synergistic relationship between the festival and the 
tourism industry should be encouraged.

The scale of the festival should be one that can be assimilated by 
the local tourism industry and not be disruptive to existing, 
permanent operations.

The festival organisers should be aware of the local 
circumstances within which the tourism industry operates and be responsive to to the needs and objectives of local operators.

Stakeholders within the local tourism industry should be fully 
involved from the initial planning stages. Attempts towards 
coordination, cooperation and control should be apparent throughout the planning process and during the operation of the festival.

To minimise leakages, to maximise the use of resources and to 
avoid duplication of effort, local resources should be fully 
integrated into the festival product whenever possible.

Consideration should be given to the image portrayed to 
potential markets by the festival. This should be compatible with the objectives of other image-building initiatives relevant to the locality.
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APPENDICES

1. The visitor survey questionnaire.
2. The host survey interview schedule.
INTERVIEWER: Follow the instructions and read the questions as shown. Introduce yourself as a member of C.I.H.E. carrying out a major research project. Ask the respondent to spare a few minutes of their time to answer a few questions. Reassure the respondent as necessary.

INTERVIEWER'S NAME:

PLACE OF INTERVIEW:

DATE OF INTERVIEW: 

DAY: Monday
      Tuesday
      Wednesday
      Thursday
      Friday
      Saturday
      Sunday

WEATHER: Sunny
         Cloudy
         Showery
         Steady rain

TIME OF INTERVIEW: Commenced  
Completed  

COMMENCE INTERVIEW

1. Where is your home?
   Town
   County
   Country (if not U.K.)

2. Where did you stay last night?
   Home  
   Other (specify place)  

9. Did Garden Festival Wales influence your decision to stay in Wales in any way?

Yes
No
Not aware of GFW

10. If the 1992 Garden Festival had been held elsewhere i.e. outside Wales, would you have visited Wales?

Yes
No

11. Has your image of Wales changed as a result of your visit?

Yes
No
Don't know
Not applicable

12. Do you think you will visit Wales again?

Yes
No
Not applicable

13. Have you visited Garden Festival Wales?

Yes
Not aware of GFW
No

14. Do you intend visiting Garden Festival Wales?

Yes
No

15. Where did you learn of Garden Festival Wales?

Use Showcard A

Locally
Mentioned by family/friends
Wales Tourist Board Guide/brochure
Garden Festival Wales promotional literature
Other guide/brochure
Advertisement/article in magazine/newspaper
TV/radio item
Sign post/sign board
Tourist Information Centre
School

16. Do you think Garden Festival Wales will affect tourism in South Wales?

Don't know
No
Yes

17. proceed to Question 11.

18. proceed to Question 18.
Garden Festival Wales

a). How did you learn of the attraction at Garden Festival Wales?

b). Did you learn of any other attractions at Garden Festival Wales?
   Yes (specify) ____________________________
   No ________________  ________________
   ...proceed to Question 22

c). Have you visited them as a result?
   Yes (specify number) ______________________
   No  ________________  ________________
   ...proceed to Question 22

d). Do you intend visiting them?
   Yes (specify number) ______________________
   No  ________________  ________________

22. Into which age category do you fall?
   Less than 15 ____________________________
   15 - 24 ____________________________
   25 - 34 ____________________________
   35 - 44 ____________________________
   45 - 54 ____________________________
   55 - 64 ____________________________
   65+ ____________________________

23. What is your marital status?
   Single  ________________  ________________
   Married ____________________________
   Divorced ____________________________
   Widowed ____________________________

24. What is your profession? ____________________________
   If necessary ask partners profession.

25. What is your postcode? ____________________________
   Gender Male  ________________  ________________
   Female ____________________________

Conclude the interview and thank the respondent for their time and cooperation.

Comments
The interview is divided into two parts. The first set of questions deal with the impact of visitors to Garden Festival Wales on the tourist attraction in question. The second part of the interview is concerned with evaluating Garden Festival Wales in terms of its contribution to the tourism product in South Wales.

1. Impacts as a result of Garden Festival Wales on the tourist attraction

Was there any significant change in the number of visitors who came to ..... this summer season i.e. as compared to previous years?

Where possible substantiate with figures.

Was there any significant increase/decrease in a particular market segment?

Which? Why?

Do you think that Garden Festival Wales influenced this in any way?

Were there any other factors that influenced this?

Prior to the opening of Garden Festival Wales (i.e. at the end of last year's season 1991) did you expect the Festival to affect business during this summer season?

How? Why not?

Did you take any measures to maximise or counteract these potential effects?

What did you do? Why not?

Can you estimate what percentage of your visitors also visited Garden Festival Wales?

2. Evaluation of Garden Festival Wales in terms of its contribution to the local tourism product

How involved were you in the decision making processes of Garden Festival Wales i.e. those associated with staging the event and the Festival itself?

Role, consultation, active participation? Was it your choice?

Was there enough co-ordination between all interests?

Are you aware of the Wales Tourist Board policy of establishing a Welsh identity within the tourism industry i.e. emphasis on culture, heritage, language, people?

What sort of image of Wales do you think Garden Festival Wales portrayed?

Did this feature in the portrayal of Garden Festival Wales by the media i.e. press and TV?
Do you think that Garden Festival Wales increased national (i.e. amongst the UK market) awareness of Wales as a tourism destination?

Do you think that Garden Festival Wales increased international awareness of Wales as a tourism destination?

Do you think that the visitors' image of Wales was changed as a result of Garden Festival Wales?

*How?*

Will this have any influence on word of mouth recommendation?

Have you any evidence that visitors were attracted to South Wales by Garden Festival Wales?

*Do you think that these people will return to the area as a result? For what reason?*

Do you think that the benefits of Garden Festival Wales were evenly distributed?

*Who were the greatest beneficiaries? On what grounds is your opinion based?*

Do you think that the costs of Garden Festival Wales were evenly distributed?

*Who suffered as a result? Why?*

Overall, do you think the benefits to tourism in South Wales attributed to the Garden Festival (if any) outweigh the costs and difficulties associated with the event?

*Conclude the interview and thank the interviewee for his/her time and cooperation.*

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November 1992

Fiona Williams