

GARDENS TOURISM – IS THE MARKET REALLY BLOOMING?

By Martin Evans*

Gardening is the UK's most popular outdoor activity, with over 27 million active participants. Its profile has never been higher, and as a draw for incoming visitors, Britain's gardens compare well with motivators such as heritage and Royalty. Yet, the gardens tourism market has not had the high profile enjoyed by walking, for example, and for many tourism operators this niche product is not yet significant to their business. This report investigates the gardens tourism market, its size and sub-sectors, and makes recommendations for tourism operators wishing to carve out a share of the market.

The gardens phenomenon

Gardening and the enjoyment of gardens have been popular pastimes for hundreds of years, but the last ten or 20 years in particular have seen this activity turn into one of Britain's hottest fashions and become a nationwide talking point. Whilst the BBC's *Gardeners World* has been on our television screens for much of this time, more recent programmes like *Ground Force* have helped give gardens and gardening a far wider mass market appeal.

Of course, it's not just television. Many stately homes and castles would not survive as visitor attractions were it not for their gardens, designed in the 18th and 19th century by figures such as 'Capability' Brown. Magazine publishers would lose some of their best-selling titles, and exhibition organisers would lose some of their most popular shows, were it not for the gardening fraternity. And even whole regions – like Kent, the 'Garden of England' – would be poorer were it not for their gardens product.

It is estimated that almost 50% of the British population are gardeners, and this makes a sizeable market for those in the tourism industry who promote gardens. Of course, not everyone who enjoys gardening wants to go on a gardens or gardening-themed break, but with day trips within the reach and purse of almost everyone, gardens tourism in its widest sense is accessible to all.

The gardens tourism market

1999 saw approximately 16 million visits to 400 gardens in Britain, and gardens enjoyed the highest growth of any attractions sector that year (with 46% of those gardens surveyed reporting an increase). However, the previous year, with poor weather affecting outdoor attractions in general, gardens suffered a fall of 7% – the first time in 13 years that gardens had experienced a downturn in visitor numbers.

In all, 'dedicated' gardens (gardens constituting attractions in their own right) account for 4% of visits to attractions in the UK, but this figure would be considerably larger if attractions like stately homes and castles – many of which have very popular gardens – were included. The market is obviously heavily seasonal, with over 80% of visits to gardens taking place in the six months from April to September. The market is also weather-dependent, and 'impulse-purchase' day visits to gardens do tend to occur on fine days.

It is a market that is strong both domestically and from overseas (with the British Tourist Authority having promoted gardens tourism as one of its main overseas marketing campaigns for the last few years). Approximately 11% of all visitors to British gardens are from overseas.

The market includes all age groups, but although there are many gardens that do have facilities and attractions for children, children actually only make up 17% of all visitors (the lowest rating of any category of visitor attraction).

'The gardeners' – and where to find them

So, just who is a gardener or a potential gardens tourist and where do we find them? First, with such a large market, it has to be acknowledged that gardeners cross all socioeconomic, geographical and most lifestyle-segment boundaries. There is no such thing as a 'typical gardener'. Yet, as we try to identify people who are more likely to become 'gardens tourists' than others, we can see groups of people who are 'likely candidates':

- Previous gardens tourists
- People who live in the country, or live in urban areas but have houses with gardens
- People who read gardening media and visit related websites
- People who attend garden shows like Chelsea, Hampton Court and Tatton Park (there are 20 such shows arranged annually by the RHS alone)
- Members of the Royal Horticultural Society (RHS) and/or local horticultural societies
- Members of other national associations like The Royal National Rose Society (12,000 members), The Hardy Plant Society (10,000 members), the British Cactus and Succulent Society (4,000 members) or The Herb Society (2,500 members)
- Members of local flower-arranging clubs or societies

- Members of newspaper-run gardeners' clubs, like the one recently launched by the Yorkshire Post
- Friends of museums or gardens attractions like Kew (the Friends of the Royal Botanic Gardens has over 20,000 members)
- Other open-air tourists like walkers
- Members of the National Trust and English Heritage.

Day visits to gardens

Each year, of the 16 million visits made to Britain's gardens, most will be made by people on day visits from their home. In total, it is estimated that well over 500 visitor attractions in the UK promote their gardens for day visits, whilst there are over 3,500 private homes that open their gardens to visitors on specific days of the year.

Many British destinations have implemented marketing campaigns which put the gardens of their area forward as a key selling point for day visits. Lincolnshire, for instance, has for some years now produced an annual guide to Gardens & Nurseries in the county, and Cheshire – promoting itself as 'England's Garden Gateway' – also has a very popular brochure on the subject (including the fact that more than one in eight of all garden visits in Britain takes place in Cheshire). Two other areas which are successful at taking a 'critical mass' of gardens attractions and promoting them to the public are Kent and Cornwall.

Gardens special interest breaks and holidays

Whilst over 20 million British adults are gardeners, a relatively small minority of them are keen enough to choose to go on a specific gardens or gardening special interest break or holiday.

Nevertheless, as a hugely popular pastime, like walking or shopping, there are those aficionados – measured in their tens of thousands – who either have already or would in the future take such a holiday.

Hotels, hotel groups and coach and tour operators have already capitalised on this and, for the fanatic, there are already a bewildering range of independent and group gardens-related holidays on offer. Tour packages such as "The Eden Project and The Lost Gardens of Heligan", "The Queen Mother's Secret Garden" and "Aberglasney & The National Botanic Garden of Wales" are proving very popular. Destinations have also joined the rush, and Cheshire, for instance, markets special "Glorious Garden Breaks" through a dedicated Travel Planner.

Within the generic gardens market are a huge number of more specific subjects in which certain people will have a special interest, and these often form the core of a particular break or holiday. For example:

- Organic gardening
- Victorian walled gardens
- Flower-arranging
- Food from gardens
- Rare and unusual plants
- Herbs
- Water gardens
- Wildlife gardens
- Garden design

Tips for attractions, hotels and tour operators

For all types of tourism operation, the product firstly has to be recognised, developed and, in some instances, packaged, and so it is with gardens tourism.

Many visitor attractions such as stately homes, museums and zoos will already have popular gardens, and for them it is a matter of maintaining the product, ensuring its display and interpretation lead to a good product experience, and marketing the gardens attraction well.

For hotels and tour operators not previously in this market, the following points should be considered to maximise your potential:

Tips for hotels and tour operators

- Look at your locality, and make an audit of gardens and gardening attractions in the area. Include stately homes with gardens, museums and art galleries with gardens, and even local parks, nurseries and garden centres.
- See if any of the attractions on your list promote themselves outside the immediate area, and are, therefore, already attracting tourists who might stay overnight.
- Look at which of the attractions welcome tourists (by concentrating on those that produce leaflets for display in hotels' brochure racks, for instance).

- Tie into any gardens-related events which are due to take place in your area, from large shows like those in London or Harrogate, to occasional spectacles like the seven-yearly Flower Festival at Lincoln Cathedral, which attracts some 2,000 flower arrangers from throughout the UK. Don't forget that with large shows, exhibitors as well as visitors will require accommodation.
- Try to extend the gardens experience into your own 'backyard' by taking a fresh look at your hotel gardens, and working to win prestigious awards like "Britain in Bloom".
- Be creative with your marketing, including your choice of advertising media: consider the list of magazines at the end of this report, and guides like *Bed and Breakfast for Garden Lovers* which includes over 100 houses with fabulous gardens, but also be aware of the growing number of good gardening websites such as www.gardening365.com and www.greenfingers.co.uk.
- Promote your hotel to the 35 tour operators who organise UK gardens tours and appear on the BTA's website, www.visitbritain.com/gardens. Examples of successful packaging and marketing of gardens by British hotels include:
 - Choice Hotels – this group developed gardens weekends themed around Britain's best collection of rhododendrons near Glasgow, and marketed them nationally, as well as using the 10,000-strong mailing list of a northern England garden centre. Jarvis Hotels – this group is the only hotel group to promote its hotels near popular gardens on the BTA's website, and therefore has exclusive exposure to thousands of overseas-based gardens tourists each month.
 - Marsh Hall Hotel, a luxurious country house hotel in Devon, promotes its own three acres of woodland gardens and its proximity to gardens attractions in a well targeted advertising campaign.
 - Heritage Hotels work with the Historic Houses Association promoting their hotel locations on the historic houses and gardens map.

Other accommodation

Accommodation for gardens tourists is certainly not confined to hotels, and many such tourists prefer the informality of a Bed & Breakfast or a self-catering cottage, or the open-air living to be found in a caravan park. Indeed, some garden attractions, like Stamford Garden Centre, have developed their own caravan site to cater for overnight visitors.

Tips for attractions

- Have a professional or amateur expert gardener look at your gardens, invite them to make suggestions for improvements and comment on the types of people who could be attracted to visit.
- Research and approach specialist (and general) group or tour operators who might be interested in putting your attraction on their itineraries.
- Consider having a television gardening personality 'endorse' your attraction. Examples include a recent tie-up between Alnwick Castle and Charlie Dimmock, Geoff Hamilton's Barnsdale Gardens, and TV gardener Alan Mason advertising Harlaxton Manor Gardens near Grantham.
- Consider other attractions which you could offer to make a more complete experience for visitors. Such as: a shop (selling plants, flowers etc), tearooms, local crafts, aquarium, small animals or butterflies, fishing, marked walks, nature trail, children's play area.
- Put on your own events, such as special plant sales, shows, walks.
- Promote your garden on the British Tourist Authority's garden website: www.visitbritain.com/gardens.

Examples of successful gardens tourism marketing by UK attractions include:

- The National Trust which probably owns more nationally-famous gardens than any other organisation and has designated 2001 as "Gardens Year".
- Normanby Hall in Scunthorpe, where becoming an RHS-designated garden has led to a dramatic increase in day visits, and the packaging of the Hall with three local hotels to promote short breaks to individuals and groups.
- The Jodrell Bank Arboretum, near Macclesfield, covers 35 acres and ideally complements the nearby world-famous radio telescope and planetarium as a dual interest visitor attraction.
- The Three Counties Showground at Malvern promotes its Spring Gardening Show and its Autumn Garden & Country Show as "Great British Days Out", especially to attract coach groups.
- Hever Castle in Kent hosts an annual Rose Week in June, when the castle itself is decorated with roses, and the castle gardeners run tours of the gardens for groups and give talks and demonstrations in a marquee in the grounds. The castle also holds an annual Spring Flower Week and an Autumn Colour Week.
- Two family-owned gardens on the Kent/Sussex border – Pashley Manor Gardens and Merriments Gardens – have joined together to offer joint tickets for groups.

The future for gardens tourism

The future for tourism based around Britain's gardens is certainly rosy, as the worldwide movement towards more environmentally-friendly or 'green' lifestyles – with such fashions as organic food – gathers pace. Trends like these will ensure that gardens and gardening remain popular leisure pursuits.

However, those gardens which charge substantial admission prices will find themselves, like any other paid-entrance visitor attraction, competing in a difficult market over the next few years, as home entertainment and shopping continue to play such a large part in people's leisure time.

And, whilst large new attractions – such as the Eden Centre in Cornwall and the Earth Centre in Yorkshire – have been developed with a gardens theme and will contribute to UK gardens visitor statistics over the longer term, equally popular attractions overseas like the Dutch bulb fields and Monet's Water Garden – professionally-packaged by UK tour operators – will continue to compete for the pound in the garden enthusiast's pocket.

Further sources of information

Visit Britain, Thames Tower, Black's Rd, London W6 9EL. Tel. 020 8563 3023 www.visitbritain.com/gardens

Royal Horticultural Society, PO Box 313, London SW1P 2PE. Tel. 020 7821 3000, Website www.rhs.org.uk

Society of Garden Designers, The Institute of Horticulture, 14-15 Belgrave Square, London SW1X 8PS

The Royal National Rose Society. Tel. 01727 850461

The Hardy Plant Society, Little Orchard, Great Cumberton, Pershore WR10 3DP. Tel. 01386 710317

National Society for Allotment & Leisure Gardeners, O'Dell House, Hunters Road, Corby, NN17 5JE. Tel. 01536 266576

The National Trust, 36 Queen Anne's Gate, London SW1H 9AS. Tel 020 7447 6700, Website: www.nationaltrust.org.uk

Bed and Breakfast for Garden Lovers, Handywater Farm, Sibford Gower, Banbury OX15 5AE. Website www.bbgl.co.uk

Fauna and Flora Preservation Society. Tel. 01223 461471

Gardening media

There are a number of leading magazines for gardens enthusiasts which give tourism operators opportunities for adverts, inserts and possibly PR:

Amateur Gardening – 50,000 magazines weekly (tel. 01202 440840)

BBC Gardeners World magazine – 320,000 copies monthly (tel. 020 8433 3959)

Country Gardener series – 205,000 copies twice-monthly, in the south-west (tel. 01297 551001)

The English Garden – 40,000 magazines monthly (tel. 020 7233 9191)

Essential Water Garden – 45,000 magazines monthly (tel. 01206 505976)

The Garden – the journal of the Royal Horticultural Society, 260,000 copies monthly (tel. 01733 898100)

Garden Answers – 120,000 magazines monthly (tel. 01733 898100)

Garden Ideas – 27,000 copies monthly (tel. 020 7233 9191)

Garden Inspirations – 60,000 copies monthly (tel. 020 7836 0519)

Garden News – 63,000 copies weekly (tel. 01733 898100)

Gardening Which – 134,000 copies monthly (tel. 020 7830 6000)

Gardens Illustrated – 40,000 copies monthly (tel. 020 7565 3000)

Organic Gardening – 20,000 magazines monthly (tel. 01984 641212)

Water Gardening – 40,000 copies monthly (tel. 01273 477374)

Your Garden – 57,000 copies monthly (tel. 01202 440870)