Destination British Columbia

EXPERIENCES BC

GARDEN TOURISM

SITUATION ANALYSIS

FINAL

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1. Executive Summary

Gardens BC (also known as the BC Garden Tourism Coalition Society) is a non-profit organization formed in 2008. Gardens BC approached Destination BC to participate in a full Experiences BC process to help develop a Situation Analysis and Strategic Tourism Plan to establish BC as the premier garden tourism destination in North America.

Sector Overview

Garden tourism products are those that support the motivation for visitors to travel to BC for a garden experience. Travel is defined as leaving your usual local area (e.g., 80 kms) for an overnight stay. However, it is recognized that a day trip is an important part of the visitation for some garden operators.

Garden tourism, while a niche sector, is a significant industry with large markets:

- The estimated total revenue for the garden tourism sector in BC is $300 million annually.[1]
- There is an estimate of 10,000 total full time and seasonal employees in the sector, including landscapers, gardeners, parks managers, landscape architects.[2]
- Overall, 13.7% of US and 17.6% of Canadian pleasure travellers had visited a garden theme attraction (botanical garden or garden theme park). Among all pleasure travellers, very few indicate that visiting a garden theme attraction was a primary reason for taking a trip (only 2.8% of US pleasure travellers, figures for Canada were not stated in study). This percentage is significantly higher when looking only at those who visited a garden theme attraction, with 20.6% of US garden visitors indicating this was a main reason for at least one of their trips in the past two years.[3]
- In general, those with a propensity to visit gardens tend to be female, older, have relatively high levels of education and enjoy above-average household incomes.
- Garden visitors are shown to be very active in their travel habits and participate in a wider variety of cultural, entertainment and outdoor activities than the average traveller.

In BC, there are hundreds of diverse garden operators. Some are large scale attractions while others are small, private gardens open to the public for viewing and still others are independent garden centres, i.e., nurseries or retail stores.

It is estimated there are currently between 50 and 100 gardens that are active in marketing their experiences to visitors. The majority of garden tourism products are located within southern BC and include a mix of public vs private, paid vs free admission, and dozens of garden types, including

[1] Source: Garden Tourism sector Expression of Interest. This is based on the revenue numbers of the Gardens BC membership and extrapolating for the non-membership.
[2] Source: Garden Tourism sector Expression of Interest.
[3] Source: TAMS 2006 – US Activity Profile – Visiting Garden Theme Attractions; Destination BC-provided TAMS data file

botanical, herb, woodland, floral show, educational, food, lavender, Japanese, Chinese, tropical and community. Most gardens offer educations, events, and other attractions and activities on site.

The top competitor for garden tourism within BC is simply other activities, particularly the wide variety of outdoor activities and greenspace (forests, shoreline, grassland, mountains) that can be enjoyed for free. A key challenge to the sector is how to differentiate itself against these other activities (and justify an admission fee for it). Second to these outdoor activities are other, more "marquee" attractions in BC such as aquariums and zoos. Washington and Oregon states provide the most direct local competition as destinations, while Ontario is seen as the closest Canadian competitor for gaining international garden visitors.

Despite significant inroads in the BC garden tourism sector over the past few decades, the sector as a whole is still developing and getting organized together. Despite its challenges (perceptions of being "boring", seasonality, funding, skilled labour) there is reason to believe the future for the sector is promising.

Positive Trends

There are significant trends that are positive signs for garden tourism in BC:

- Growth in global tourism.
- Aging population.
- Urbanization and increasing need for green spaces.
- Increasing value placed on ethical and environmental concerns.
- Increase in active relaxation to manage stress.
- Interest in food production and food safety.

Key Direction for the Strategic Planning

- **There are positive signals for growth that demonstrate BC could create a real presence in garden tourism sector marketing in the Pacific Northwest and Internationally.** Significant steps have been taken to organize and develop the garden tourism sector to date and there opportunities exist to demonstrate the sector has growth potential in the future.

- **Further information is needed to better understand the BC garden tourism sector as well as consumer behaviour and perceptions of the BC garden tourism product**. Currently, information specific to BC is limited to old studies (TAMS) or new information specific to the Cultivating Our Markets (COM) project study for botanical gardens, which is not specifically tourism focused.

- **A definition for garden tourism in BC is required.** This will ensure marketing efforts are focused on the garden tourism operators that will deliver growth for the sector.
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- **There are opportunities to engage new audiences (local and near-in markets) in the garden tourism experience.** In particular, education programs appear to appeal to a wide audience, specifically the desire to learn more about nature conservation, growing food, having a home garden, and other nature-related topics. New attractions and events have shown to be a great way to increase awareness, create trial, create new users, and increase visitation to gardens globally. The BC garden tourism sector will need to create new advocates by ensuring it features events and educational offerings that are evolving to meet new needs and interests.

- **The garden tourism sector can explore a number of different complementary activities to create the authentic, cultural experience their existing target market is seeking**. Garden visitors are shown to be very active in their travel habits and participate in a wider variety of cultural, entertainment and outdoor activities than the average traveller.

- **An increase in marketing efforts is required to better promote the BC garden tourism experience**. Efforts are required to create interest and urgency in visiting gardens. Potential activities could include development of Gardens BC website, development of digital strategy, increase presence in travel trade itineraries, development of packaged offers, increase the promotion of on-site activities and attractions, and increase in events.

- **Key messaging needs to be developed that balances the interests and attitudes of current and potential markets.** Messaging could include: environmental concerns, the appeal of nature (in an increasingly urban world), relaxation/rejuvenation, attractions/activities/events within gardens, complementary activities, and shoulder season offerings.

- **Partnerships may be a key strategy for growth**. Gardens are seen as supporting tourism products for many of BC's tourism industry, including touring, wineries, arts and culture, museums and heritage sites, and agritourism. Also, there are significant and passionate garden partners that could be leveraged for the garden tourism sector in BC.

Destination British Columbia

2. Background

Gardens BC (previously known as the BC Garden Tourism Coalition Society) is a non-profit organization formed in 2008. Gardens BC approached Destination BC to participate in a full Experiences BC process to help develop a Situation Analysis and Strategic Tourism Plan to establish BC as the premier garden tourism destination in North America.

Experiences BC is designed to help identify and assist Sector Associations or Sector Consortiums in their efforts to develop and promote a market-ready tourism product with a provincial focus. The objectives in the program are to:

1. Generate new or extended tourism-related visits, activities or higher yields;
2. Add incremental tourism revenue at the provincial, regional or community level;
3. Improve the utilization of existing sector capacity;
4. Identify sector relevant tourism-related regulatory/policy concerns (i.e. land/tenure access) and work with the appropriate government agencies towards possible resolution;

Gardens BC submitted their Expression of Interest in March 2012 and was subsequently accepted into the Experiences BC Sector Development program shortly thereafter. On January 24, 2014 Planning Meeting #1 was held, which gathered garden tourism stakeholders together to explore the issues that are fundamental to growing the garden tourism sector in British Columbia. For a list of meeting participants, please see Appendix 1.

The full Experiences BC process is outlined below:

This Situation Analysis report was created to feed into the process and provide robust information to assist with the development of the Tourism Marketing & Development Plan. The report was created from existing primary and secondary research, information and reports as well as input provided by the stakeholders during Planning Meeting #1.

3. Operating Environment

The following section reviews economic and tourism trends from a global perspective.

Economic Outlook

The International Monetary Fund (IMF) reports[4] that global activity strengthened during the second half of 2013 and is expected to improve further in 2014-15.

Despite a weak start in 2013, economic activity in advanced economies strengthened during the second half of 2013 and are expected to gradually improve further in 2014-15. Activity in developing countries had already picked up. Overall, global growth is projected to increase from 3% in 2013 to 3.7% in 2014 and 3.9% in 2015. Growth in the United States is expected to be 2.8 percent in 2014, up from 1.9 percent in 2013. Overall, growth in emerging market and developing economies is expected to increase to 5.1 percent in 2014 and to 5.4 percent in 2015.

However, there are some risks to the growth forecasts, including the fiscal contraction in the United States. In the US, policy makers may need to raise the debt ceiling again. Overall, thought positive signs are evident, there is still a fragile economic uncertainty in the US. Globally, policies will focus on ensuring robust growth and managing vulnerabilities despite the expected strengthening of activity.

World Tourism Trends

Tourist Arrivals, Receipts & Outlook

Despite various shocks, international tourist arrivals have grown 40-fold, from 25 million in 1950, 278 million in 1980, 436 million in 1990, 677 million in 2000, and topping 1 billion in 2012. International tourist arrivals worldwide are forecasted to increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030, according to the United Nations World Tourism Organization's (UNWTO) long term forecast Tourism Towards 2030[5].

International tourism receipts were also up 4% over 2011, with 6% growth seen in the Americas specifically. The top destinations globally by both arrivals and receipts are as follows (Figure 1):

[4] Source: World Economic Outlook, IMF, January 2014
[5] Source: UNWTO, Tourism Highlights, 2013

Figure 1 - Top 10 destinations by International Arrivals & Receipts

Arrivals	Millions	% chg (11-12)	Receipts	US $Billions	% chg (11-12)
1. France	83	2%	1. US	$126	9%
2. US	67	7%	2. Spain	$56	1%
3. China	58	<1%	3. France	$54	7%
4. Spain	58	3%	4. China	$50	1%
5. Italy	46	1%	5. Macao	$44	13%
6. Turkey	36	3%	6. Italy	$41	4%
7. Germany	30	7%	7. Germany	$38	6%
8. UK	29	<-1%	8. UK	$36	5%
9. Russia	26	13%	9. Hong Kong	$32	16%
10. Malaysia	25	1%	10. Australia	$32	<-1%
Canada	16	2%	Canada	$17	n/a

Source: UNWTO Tourism Highlights, 2013

Note: The UNWTO calculates the growth rate in tourism receipts based on local currencies, not the receipts in $US, due to fluctuations in relative exchange rates.

With a ten-year positive outlook for international tourism arrivals, the UNWTO's forecast is for tourism to continue to be a strong, healthy industry globally over the next decade, although the Americas will show lower-than-average growth rates[6]. The latest numbers released by the UNWTO exceeded expectations: international tourist arrivals grew by 5% in 2013. For 2014, UNWTO forecasts 4% to 4.5 % growth – again, above the long-term projections[7].

World Demographic Trends

As mentioned, a continued increase in global tourism is expected, with total worldwide trips approximately doubling over 20 years. This is buoyed by several key global demographic trends[8]:

- **Population Increase** - An increase in global population of 20 percent over the next 20 years is expected, driven by increases in the Americas and Asia. Population will reach 8.3 billion by 2030, from 6.9 billion in 2009. The prime causes of population growth will continue to be fertility and life expectancy.

[3] Source: UNWTO Tourism 2020 Vision; www.unwto.org/facts/eng/vision.htm
[7] Source: UNWTO Press Release, January 20, 2014; http://media.unwto.org/press-release/2014-01-20/international-tourism-exceeds-expectations-arrivals-52-million-2013
[8] Source: UNWTO Demographic Change and Tourism Report, ITB World Travel Trends

- **Increasing Wealth and Migration -** Increasing economic development and wealth in developing countries is already and will be a key driver of world tourism volume. The generation of global wealth is shifting east and south, driven by Asia's growth. In particular, China, India, Mexico and Brazil have been identified as emerging markets for BC. However, there is expected to be increasing competition for global tourist dollars as more and more destinations (e.g. China) are seeing the economic benefits of tourism and are aggressively trying to attract travellers. The increasing migration of a mobile population around the world also stimulates tourism, as family and friends visit the migrants, or the migrants return home for vacations.

- **Urbanization** - Tourism development from emerging markets is also stimulated by an increase in people living in cities throughout the world. In addition to the wealth in cities, city dwellers generally have more cosmopolitan attitudes and a greater aspiration and orientation to tourism and travel.

- **Aging but Healthier Tourists** - Prospective tourists from established markets, e.g. Europe and Japan, are aging. First, the population of these countries is aging, as birth rates decline. There is also an increase in life expectancy, and especially healthy life expectancy in which older tourists have a fitter/younger outlook and capability, with the time and wealth in semi- or full-time retirement to travel. Tourism will need to account for the needs and preferences of older travellers.

Tourism Competitiveness

The World Economic Forum (WEF) Travel and Tourism Competitiveness Report is published every two years and ranks the tourism sectors of 140 countries in terms of 14 pillars of competitiveness. Together these constitute the Travel and Tourism Competitiveness Index (TTCI), which is a measure of the factors and policies that make it attractive to develop the travel and tourism sector in different countries.

The 2013 analysis[9] finds that Canada's competitive position improved to eighth overall, a gain of one position over 2011. The strengths driving Canada's competitive advantage include rich natural resources, highly qualified human resources, cultural resources and air transport infrastructure. Of particular concern, however, are the noted weaknesses placing Canada at a competitive disadvantage:

- **Visa requirements** - The report finds Canada's visa requirements are increasingly uncompetitive, slipping from 72nd in 2009 to 106th in 2013. While the USA is even more restrictive and ranked 121st in 2013, the UK ranked 46th, one of the highest among advanced economies.
- **Price competitiveness** - 124th and slipping from 105th in 2011. Two factors in particular are driving this result:

[9] Source: Office of Strategy Management & Research, Canadian Tourism Commission, April 2013

- Ticket taxes and airport charges – Canada's are among the highest in the world (136th of 140 countries) and pose a significant barrier to the competitiveness of the tourism industry by making both domestic and international travel to the country more expensive for visitors.
- Purchasing power parity – ranked 131st.

Key Insights

While the overall improving economic landscape and outlook for world tourism are both positive indicators for future tourism growth in BC, there is still economic uncertainty from BC's largest source of international visitors, the US. This impacts travel to BC as tourism tends to be a discretionary purchase that depends on personal disposable income. When economies are strong, tourism spending grows more rapidly than consumer spending as a whole. Stringent travel requirements to Canada are also a concern, particularly from another key market, China (still required to obtain a visa for travel).

An aging tourist base is a positive trend for the garden sector, as this fits with the traditional target market for garden visitation. An important distinction, though, is that while aging, this tourist will lead a more active/adventurous lifestyle and the tourism industry will need to be mindful of this younger mindset while still accommodating the needs of older travellers.

The trend towards urbanization will be another one to watch for the garden tourism sector, as an increasingly urban tourist base may not have as much engrained affinity for gardening. The sector will need to consider attractive complementary activities to appeal to those who may rarely "get their hands in the dirt", or position gardens as a peaceful escape from an urban lifestyle.

4. Consumer Shifts and Travel Trends

Many underlying shifts in the consumer landscape are having an effect on the travel industry.

Economic & Demographic

There are two key trends that will have a particular impact on maintaining and building the "inventory" of those who would have a propensity for garden visitation.

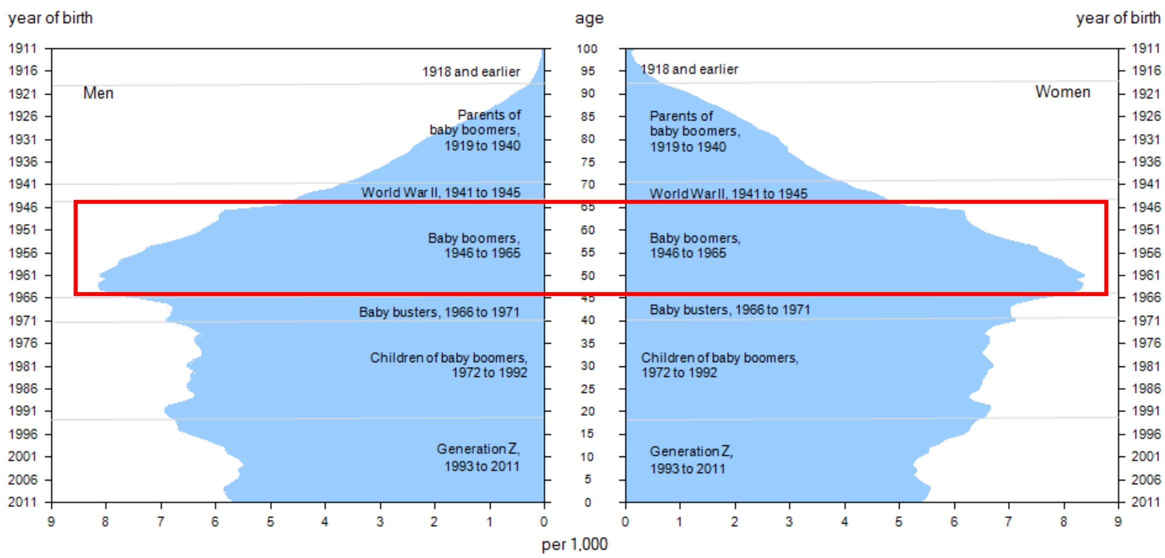
The first is a demographic shift that has far-reaching implications for society in general, and that is the aging population (a worldwide trend and one particularly felt in Canada and the US).

Approximately 10 million Baby Boomers (those born between 1946 and 1965) are coming close to retirement, and it is expected by 2031 seniors will account for 23-25% of the total Canadian population (almost double what it was in 2009)[10](Figure 2). They will have ample leisure time, and disposable

[10] Generations in Canada, Statistics Canada; http://www12.statcan.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003_2-eng.cfm

income, both factors presenting an obvious opportunity to the tourism sector in general, and garden tourism in particular, given a greater affinity for gardening amongst this age cohort.

Figure 2 - Portrait of Generations, Canada 2011



Source: Statistics Canada, Census of Population, 2011, http://www12.statcan.ca/census-recensement/2011/as-sa/98-311-x/2011003/fig/fig3_2-2-eng.cfm

Perhaps a less obvious, but still important, trend is the state of the housing market since the economic downturn, particularly in the United States (BC's key source of international visitors). In that country, housing starts are beginning to make a slow recovery but are less than half of what they were prior to the recession in 2008/2009 (Figure 3). Fewer home owners means fewer gardens to take care of and, therefore, fewer people developing an interest in gardening as a leisure activity.

Figure 3 - Single-Family Housing Starts, US, 1989-2012

Source: National Association of Home Builders; http://www.nahb.org/generic.aspx?genericContentID=45409

While the recession is certainly a driving force behind the housing slowdown, others suggest that the next generation to hit a home-buying phase of their lives may simply not be as enthusiastic about it as the generations before them, recovery or not. A recent article[11] suggests that Millenials (those born between the early 80's to early 00's) show a stronger interest in urban or "urban light" (denser, "walkable" suburbs) living, trading in larger homes for condos, townhomes and smaller houses. Again, this could have an impact on developing an interest for gardening among a demographic group that already shows lower participation.

Values & Attitudes

Through its research[12], UNWTO has uncovered several trends in values and lifestyles that will lead to a more segmented and diverse tourism market. These include:

- **Value for Time** - Individual incomes have risen in most countries, making more products and services affordable and changing people's attitudes towards work and leisure. Globally, total working hours have declined leaving people with more time for leisure, travel and personal development. Despite this increase in available leisure time overall, the time pressures of the modern world can be oppressive. "Value for time" is becoming a priority as people try to balance leisure activities and finances.

- **Internationalist and Cosmopolitan Attitudes** – More individuals, typically in the younger generations, see themselves as 'global citizens', driven by international media and culture. Young Asians in particular are increasingly cosmopolitan.

[11] Source: The Cheapest Generation, The Atlantic, August 2012
[12] Source: UNWTO Demographic Change and Tourism 2011, UNWTO World Values Survey

- **Increasing Sense of Risk and Adventure** - Adventure-seeking has grown in developed countries, predominantly among younger generations. As people age, they tend to be more risk averse, which may also stimulate traditional or "sightseeing" holidays (though healthier older people may still seek some element of adventure).

- **Ethical and Environmental Concerns** – The UNWTO World Values survey found an increasing engagement with international development and aid across all age groups, while awareness of and concern for the environment has risen around the globe. However, environmental concerns will remain tempered by reluctance to pay extra for green products and services. Related to this environmental concern, further research[13] revealed that nature will be increasingly valuable in a world with rapidly urbanizing populations and disappearing natural habitats.

- **Passive versus Active Entertainment**. The Cultivating Our Markets project (COM, see page 42) identified passive entertainment (such as reading, watching television and movies) as dominant activities, but with a shift in movement toward more interactive forms of leisure activity, including video/computer games and social media.[14]

- **The Relaxation Generation.** COM also identified "that the leisure time available to individual Canadians has not changed significantly since 1986, yet there remains a widespread perception that modern life is increasingly hectic and stressful". An increase in going to a gym, running, yoga, spa treatments, massage, meditation and retreats are just a few noted examples of how society is reacting to the perception of stress.[15]

- **Food Production.** Growing food at home has seen resurgence in North America in response to growing public concerns about pesticides, bacterial contamination and genetic modification.[16]

Travel Trends

The following represents a collection of trends[17] specific to travel patterns and interests which will have implications in developing a garden tourism strategy:

- As people become wealthier and can meet more of their daily needs, **they seek experiences over goods**. Travellers are increasingly seeking memorable experiences that are authentic, personalized and involve social and cultural interaction. Also, there is a growing demand for backpacker travel among the developing Asia markets.

[13] Source: CSIRO Futures, Destination BC
[14] Source: Phase 1 Report: Trends Affecting International Gardens, May 28, 2013, Chimpanzee
[15] Source: Phase 1 Report: Trends Affecting International Gardens, May 28, 2013, Chimpanzee
[16] Source: Phase 1 Report: Trends Affecting International Gardens, May 28, 2013, Chimpanzee
[17] Source: Provincial Situation Analysis, Destination BC, 2013

- People are travelling more frequently and go to more destinations than before, not simply for leisure, but for business, conferences, events, trade and health care. **Travel is often multi-purpose**, and migration linkages increasingly play an important role in motivating trips. The aviation industry plays a central role in global mobility but is highly dependent on the availability and cost of fossil fuels.

- Consumers are becoming more sophisticated travellers, with a corresponding increase in the **expectations of quality service delivery**.

- Consumers continue to look for **value for money** (and "value for time"), booking shorter trips and less expensive travel options. Conversely, some analysis reports an increase in luxury travel; however, this could be a return to market from pre-2008 levels. The higher price tag may confer a higher status and cachet in the eyes of international travellers.

- Interest has grown for multiple activities and experiences packaged as a **complete itinerary**.

- As the **Path to Purchase models change and become more fluid** (skipping steps, going back, etc.), destinations need to provide travel prospects a wide variety of types of travel information through many different channels. Different prospects are at different stages of travel decision-making, and different people require different information. Awareness and inspiration occur mostly through traditional media, and trip planning through on-line web-sites and traveller review sites.

- **Shorter trip planning cycles** continue to be a trend, however, there is also a more recent trend of a return to longer trip planning cycles as was seen pre-recession in 2008.

- **Tourism is highly sensitive to extreme events**, such as political conflict, natural disasters, financial shock and pandemics. Extreme weather and infectious disease outbreaks are more likely as the climate changes, and drug resistance and human mobility increases. Perceptions of safety are often destination-dependent and people may switch destinations rather than cancel their travel plans. Early warnings systems and efficient recovery plans demonstrate to travellers that BC and Canada are safe destinations.

Technology

Technology continues to have a significant impact on travel planning[18]:

- **Digital mobile technologies are changing the way people communicate, access information, assess credibility, and make decisions**, in particular over the last five years. By 2012, 38% were doing some travel planning on their mobile devices. A large proportion were accessing either a

[18] Source: Provincial Situation Analysis, Destination BC, 2013

tablet (21%) or smart phone (14%) during the trip itself (the percentage represents method *most* used to access travel information, so total usage will be even higher). Mobile technology is also allowing travellers to shift plans and change bookings very quickly, though mobile bookings are low at this point (but expected to grow rapidly). Despite all of the digital opportunities, however, face-to-face interactions will remain paramount.

- While today's older travellers are less likely to use the internet and mobile devices, this may change radically in the next 10 years as **computer-literate travellers use technology to enhance all aspects of travel**, from trip planning to in-destination experiences to ongoing relationships with tourism operators.

- With social media, **individuals can influence the thinking of millions in hours or minutes**. Trip Advisor and similar travel review sites are now well-used by trip planners (one-third reported consulting online review sites in 2012[19]) to obtain input from other travellers.

- Social networks such as Facebook or Twitter are still an occasional planning tool for most, but are growing in importance among younger travellers. At this point, **advocacy for a destination may be the most important role for social network users**.
    - This is supported by further Canadian Tourism Commission (CTC) research that revealed almost three in ten Canadian domestic travellers used social networks (via computer) to share photos or messages during a trip, with a further 20% sharing via mobile phone. Post-trip, a third shared photos and information via social networks[20].

Key Insights

In the near- to medium-term, demographic trends certainly play in garden tourism's favour, with Baby Boomers just beginning to hit retirement age. While enjoying this influx of visitors with time and money, the garden tourism sector will need to consider its long-term prospects and who will backfill for this segment once it has cycled through. Though an interest in ornamental/display gardening may be waning among the next generation, they have other interests (food gardening, the environment, etc.) that will need to be tapped into to ensure the on-going viability of the sector.

While an ultimate goal of the BC garden tourism sector is to position gardens as a primary visitation driver, it will need to be cognizant of the trend towards shorter, cheaper, multi-purpose travel (value for time, value for money) and position the appeal of a garden visit among many other competing interests on a short-haul stay.

The increasing interest in seeking out memorable, authentic experiences, growing environmental concern, and the appeal of nature (in an increasingly urban world) are all trends that could help in this positioning.

[19] Source: Provincial Situation Analysis, Destination BC, 2013
[20] Source: Global Tourism Watch, 2012 Canada Summary Report, CTC

The increasing interest in activities that facilitate relaxation, rejuvenation and tranquility is a trend that aligns to the key motivator for visiting gardens and could be leveraged to attract new markets or increased visitation.

The garden tourism sector will need to consider ways to intelligently incorporate technology and interactivity to complement the garden experience without damaging the sense of escape that many are seeking in this increasingly technology-driven world. This should include all phases of the trip – pre-planning, providing in-destination information and post-trip advocacy.

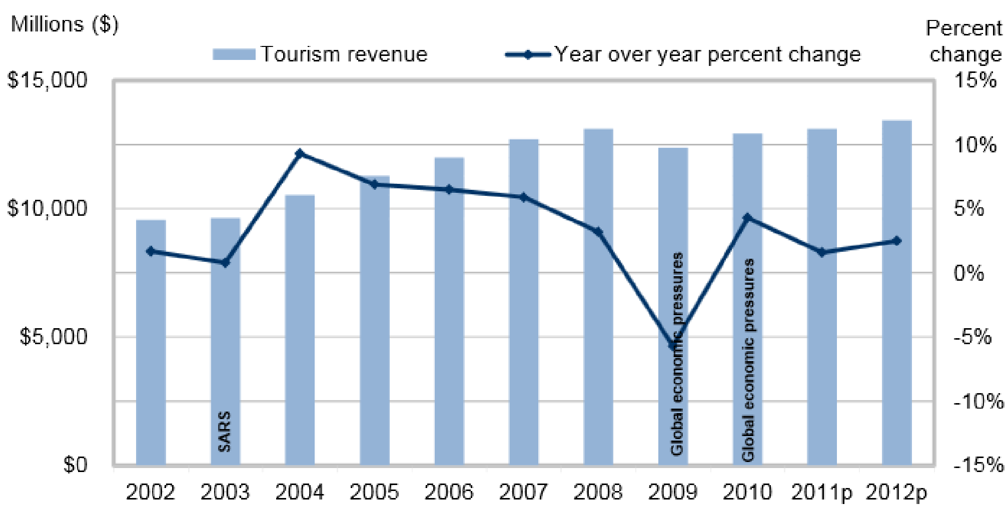
5. Local Context

Tourism is a critical sector within BC's economy and this section explores its performance[21] as well as the challenges and trends that are shaping the industry from a local perspective.

Performance

- In 2012, the tourism industry generated $13.5 billion in revenue, a 2.5% increase from 2011, and a 4.5% increase from 2002 (Figure 4).
    - $1.5 billion of accommodation room revenue was earned in communities with the Municipal & Regional District Tax (MRDT), an increase of 1.6% from 2011.

Figure 4 - Overall Tourism Revenue and Year-over-Year Change (2002-2012)



Source: Destination BC, Value of Tourism 2012

[21] Source: Destination BC, Value of Tourism 2012

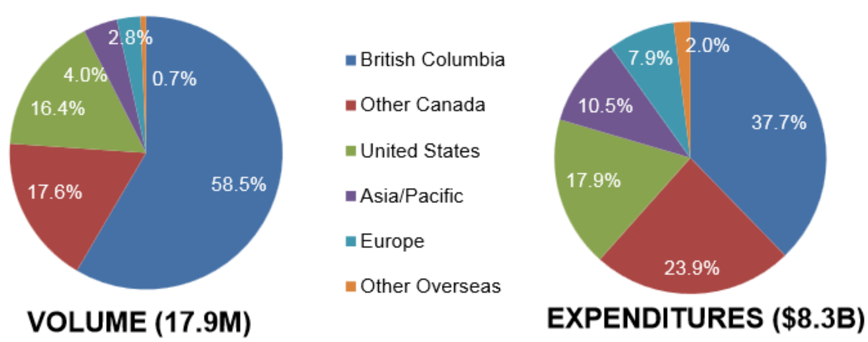
- The tourism industry generated a direct contribution to British Columbia's gross domestic product (GDP) of $7.1 billion (2007 constant dollars), an increase of 2% over 2011, and a 4% increase from 2007.
- Employment in the tourism sector rose for the first time since 2008. In 2012, there were 18,387 tourism establishments in BC employing 127,300 people. In 2012, the tourism industry paid $4.3 billion in wages and salaries.

Tourism Trends to British Columbia

Overall Visitor Volume and Expenditures

- In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent $8.3 billion, a decline of 2.4% from 2011. Over half of the visitors (58.5%) were British Columbia residents (Figure 5). Visitors from other parts of Canada accounted for 17.6% of all visits, while international visitors accounted for the remaining 23.9% of visitor volume. However, international visitors accounted for 38.4% of visitor expenditures. British Columbia residents accounted for 37.7% and Canadian residents accounted for 23.9% of visitor expenditures.[22]

Figure 5 - Overall Visitor Volume and Expenditures by Market Origin (2012)



Source: Destination BC, Value of Tourism 2012

International Visitation[23]

- In 2012, nearly 4.3 million international travellers visited Canada and spent at least one night in BC. These travellers spent $3.2 billion during their trips (expenditures are for whole trip

[22] Destination BC, Value of Tourism 2012

[23] Destination BC's 2013 Provincial Situation Analysis documents.

including BC and other places in Canada). Overall visitation decreased 19% between 2001 and 2012, while overall expenditures decreased 12%.

- The United States is BC's largest international market, accounting for 69% of total visitor volume and 47% of total expenditures. So while they were the source of the largest share of international expenditures, US visitors spend proportionately less than visitors from overseas.

Domestic Visitation[24]

- In 2011, Canadian residents took 13.4 million person-trips within their country where they spent at least one night in BC. Travel by Canadian residents grew by 11% over 2010 and 40% since 2006.
- These domestic trips generated just over $5 billion in expenditures, showing 9% growth since 2010 and 23% growth over 2006 levels.
- While BC residents account for three-quarters of visitation, they generated just 59% of expenditures.
- On average, BC residents spent just over three nights during a trip in their home province while Canadian residents spent over five nights during a trip in BC. Travel party size was generally consistent for BC and other Canadian residents, averaging 1.6 people per party. Generally, about 15% of travel parties included children under 18 years of age. BC residents spent an average of $134 per travel party per night during their trip while other Canadian residents spent $155 per party per night, on average. Food and beverage tended to account for the largest proportion of trip spending followed by accommodation and vehicle costs (private vehicles or rentals).
- In terms of regional visitation, the Vancouver, Coast and Mountain region captures about half of visitor volume, followed by Vancouver Island and the Thompson Okanagan region (Figure 6)(note % will not add to 100% due to visitors in multiple regions).

Figure 6 - Regional Visitor Volume

	Overnight Visitation (,000)	% Visitation
BC	15,729	
Vancouver, Coast, Mountain	7,182	46%
Vancouver Island	3,736	24%
Thompson Okanagan	3,309	21%
Kootenay Rockies	1,581	10%
Northern BC	919	6%
Cariboo Chilcotin Coast	484	3%

Source: Provincial Situation Analysis, Destination BC, 2013

[24] Destination BC's 2013 Provincial Situation Analysis documents.

Overview of Challenges

Tourism plays an important role in diversifying the economic base throughout British Columbia. The following provides an overview of the current operating environment and some of the challenges faced by the industry.

- Within North America the **fragile economic recovery** from the 2008 global recession and resulting fluctuations in consumer confidence continue to impact travel, however some analysis is reporting a return to pre-recession travel and decision-making patterns.
- The **general historical decline in visitation from the US** travel market to BC continues to impact many BC destinations. Although still not at 2008 levels in the last few years we have seen some increases in US overnight visitation. 2013 US overnight custom entries was up 4.3% over 2012. The increased strength of the US exchange rate may have some impact. Budget cuts from the Canadian Tourism Commission led to reduced marketing activities in the US market. In December 2013, they announced some reinvestment in 2014.
- **Border security and visa requirements**/administration processes continue to provide challenges with facilitating quick, easy crossing through Canadian borders.
- There are continued challenges with ensuring **affordable, convenient air access** to and throughout BC. A fluctuating dollar and the relatively high cost of BC as a destination continues to present challenges as consumers shift to destinations and travel experiences that offer more compelling value.
- **Increasing gas prices** impact consumer travel decisions. As a local comparison point, in July 2013 the average price of gas in Vancouver was 22 cents per litre higher than the national average. Long-term trends indicate that the high prices experienced in the past five years may be the new normal.
- There are continued challenges with **increasing BC Ferries fares**, declining ridership and potential changes to route schedules.
- According to the B.C. Tourism Labour Market Strategy, there are **pending labour shortages** for tourism throughout BC. There is a requirement for 101,000 jobs by 2020 comprised of 44,000 new jobs and 71,000 job replacements[25].
- There has been a growth in the awareness and availability of **aboriginal tourism experiences** throughout BC, with efforts led by Aboriginal Tourism Association BC (AtBC).

Key Insights

Overall, the tourism sector is seeing positive growth globally, in Canada and in BC, but BC faces challenges to fully capitalize on the growth potential.

The reinvestment in the US market by the CTC in 2014 may be positive for BC, in particular for the garden tourism products on Vancouver Island and other destinations close to the border, which have historically seen higher visitations rates from the US market.

[25] www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx

The pending labour shortages will impact garden tourism businesses, and proactive plans should be developed to ensure business operations can continue when the labour shortage is felt.

6. Product and Service Update

Product Overview

In BC, there are hundreds of diverse garden operators. Some are large scale attractions while others are small, private gardens open to the public for viewing and still others are independent garden centres, i.e., nurseries or retail stores. The estimated total revenue for the garden tourism sector in BC is $300 million annually.[26] More specifically to the garden tourism sector, it is estimated there are between 50 and 100 gardens that are active in marketing their experiences to visitors. There is an estimate of 10,000 total full time and seasonal employees in the sector, including landscapers, gardeners, parks managers, landscape architects.[27]

Product Description

During the January 24, 2014 Planning Meeting #1, a discussion was had as to what could be included in a broad definition of garden tourism. The following was extracted from the broader list to assist with providing a more refined definition of garden tourism. The following types of garden tourism product were selected for the following reasons:

- Garden tourism products are those that support the primary motivation for visitors to travel to BC for a garden experience. For example, travel motivated to visit Dr. Sun Yat-Sen Classical Chinese Gardens would be garden tourism whereas travel to take a UBC gardening course would be classified as educational tourism.
- Travel is defined as leaving your usual local area for an overnight stay. However, it is recognized that a day trip is an important part of the visitation for some garden operators.
- The garden industry is robust, with many businesses, organizations and experiences supporting the primary garden tourism product. However, these are not garden tourism products that visitors would travel to experience, e.g., landscapers, associations, transportation. See Product Partners on page 27 for a full list of garden tourism partners.

Product Type	Overview	Examples
All kinds of gardens, private and public	• Hundreds of outdoor and indoor gardens in BC. • Estimated 50 - 100 are actively involved in tourism industry and promoting their garden operation to visitors.	• Botanical, display • Historical, heritage • Municipal parks, Provincial Parks (BC Parks) • Unique community

[26] Source: Garden Tourism sector Expression of Interest. This is based on the revenue numbers of the Gardens BC membership and extrapolating for the non-membership.
[27] Source: Garden Tourism sector Expression of Interest.

		gardens, e.g., Xeriscaping
Public spaces and other sites	• There are public garden spaces and other garden-related sites in virtually every community in BC. • Some communities participate in Communities in Bloom program. • Many communities are active in beautification of their streetscapes, e.g., Whistler, Squamish.	• Public spaces, streetscapes, public squares • Cemeteries • Zoos
Festivals and events	Garden Festivals • Garden Festivals are held in multiple communities in BC. • Example: Nelson Garden Festival currently in 13th year with 60 booths downtown. Entertainment in gardens Examples include: • Milner Gardens hosts murder mystery teas and Music by the Bay evening concerts. • Horticulture Garden of the Pacific holds an annual Arts and Music in the park, with 60 artists, musicians and vintage cars displayed throughout the gardens. • The Butchart Gardens summer season features over 90 days of outdoor concerts and Saturday night firework shows. Garden Shows • BC Home and Garden Show in Vancouver (February 2014) had 58 exhibitors for “Garden, Landscape and Outdoors”. • There are multiple home shows across BC that include “garden & landscapers”, e.g., Kelowna, Fraser Valley, Parksville. • Brian Minter was a keynote speaker at the 2014 Fraser Valley Home Show. Events Examples includes: • UBC Botanical Garden “A Growing Affair” (spring plant sale) offers displays, demonstrations, tours, advice, plant sales, garden supplies sales, children’s activities. • Festival of Lights at VanDusen Botanical Gardens attendance of 93,000 people (2013), which was #12 largest festival and cultural event in Vancouver (BIV magazine). • VanDusen Plant Sale – 40,000 plants sold in one day.	• Garden festivals • Home and garden tours • Entertainment in gardens • Garden events

	• March Morpho Madness at Butterfly Gardens celebrates the release of 1,000 Blue Morpho butterflies.	
Independent garden centres	Included are independent, destination garden centres, in which people would travel to visit it. Garden Centre • An example is Minter Gardens, a destination garden centre, which receives thousands of visitors annually to its garden centre. • While there are also multiple large chain garden centres, for purposes of garden tourism they are not included in the definition. Flower shops • Many garden operators within BC offer flower shops as part of their experience.	• Garden Centre • Flower shops

Product Tiers

According to the Garden Tourism sector Expression of Interest, the southwest corner of BC is categorizes as Zone 7-8 in terms of growing ability whereas the rest of Canada is listed as Zones 1 to 5. This gives the Lower Mainland and Vancouver Island a modified Mediterranean climate that is quite unique. Similarly, although the Okanagan climatic zonage is not uncommon in the rest of Canada, from a growing perspective, it is described as 'high desert chaparral'. In the Okanagan and in the southwest corner of BC, it allows for the possibility of plants that are unique in Canada. It is an essential reason why the Butchart Gardens are considered a world class garden destination – the combination of modified Mediterranean and high desert chaparral is globally unique.

This unique climatic reality has allowed the creation of Tier 1, Tier 2 and Tier 3 tourism attractions.

Tier 1	Tier 1 attractions draw international and national tourism traffic as well as provincial and local traffic. Includes The Butchart Gardens, Butterfly Gardens and Van Dusen Gardens.
Tier 2	Tier 2 attractions tend to generate some international and national tourism traffic but draw more broadly from provincial and local tourism traffic. Includes smaller gardens such as the Horticulture Centre of the Pacific, UBC Botanical Garden and Guisachan house.
Tier 3	Tier 3 gardens tend towards local and provincial tourism traffic. Includes many retail garden operations, Communities in Bloom, nurseries, etc. Although they are not primary destinations, they are widespread and almost all communities in BC have such attractions. While visitation may be small for each garden operation individually, as a collective they generate significant visitation.

The following list of 47 BC gardens has been sourced from Gardens BC and tourism websites, including Destination BC's HelloBC.com, Vancouver Island Garden Trail, and Travel.bc.ca. It is important to note that this list is not inclusive of all garden tourism operators or stakeholders, but those that were known and actively participating in tourism programs.

NOTE: The tier level for each gardens needs to be validated.

Name of Garden	Community	Region	Tier
Butchart Gardens	Victoria	VI	1
Dr Sun Yat-Sen Classical Chinese Garden	Vancouver	VCM	1
VanDusen Botanical Garden	Vancouver	VCM	1
Victoria's Butterfly Gardens	Victoria	VI	1
Abkhazi Gardens	Victoria	VI	2
Crystal Cove	Tofino	VI	2
Elysium Gardens	Kelowna	TO	2
Governor's House Gardens	Victoria	VI	2
Guisachan House	Kelowna	TO	2
Hatley Gardens, Royal Roads University	Victoria	VI	2
Hollyhock	Cortes Island	VI	2
Horticulture Centre of the Pacific	Victoria	VI	2
Kitty Coleman Woodland Gardens	Courtenay	VI	2
Milner Gardens	Qualicum Beach	VI	2
Minter Gardens	Chilliwack	VCM	2
Nikkei Memorial Centre Gardens	New Denver	KR	2
Point Ellice house	Victoria	VI	2
Prince Rupert Sunken Gardens	Prince Rupert	NBC	2
Sooke Harbour House	Sooke	VI	2
St. Ann's Academy	Victoria	VI	2
Stanley Park Gardens	Vancouver	VCM	2
Tofino Botanical Gardens	Tofino	VI	2
UBC Botanical Gardens	Vancouver	VCM	2
Arthur Erikson House and Garden	Vancouver	VCM	3
Avia West - Parkside Hotel and Spa	Victoria	VI	3
Bear Creek Gardens	Surrey	VCM	3

Centennial Rose Garden	Burnaby	VCM	3
Century Gardens	Burnaby	VCM	3
Columbia Valley Botanical Gardens	Invermere	KR	3
Cominco Gardens	Kimberley	KR	3
Communities in Bloom	BC	All	3
Cougar Annie's Garden	Tofino	VI	3
Cowichan Valley Lavender Labyrinth	Cowichan Valley	VI	3
Dart Hill Garden Park	Surrey	VCM	3
Finnerty Gardens	Victoria	VI	3
Fleetwood Gardens	Surrey	VCM	3
Hazelwood Herb Farm	Ladysmith	VI	3
Kohan Garden	New Denver	KR	3
Mrs. Murray's Flower Garden	Fort St. James	NBC	3
Okanagan Valley Herb Farm	Kelowna	TO	3
Park & Tilford Gardens	North Vancouver	VCM	3
Parksville Museum & Gardens	Parksville	VI	3
Rollin Art Centre	Port Alberni	VI	3
Summerland Ornamental Gardens	Penticton	TO	3
The David Douglas Botanical Garden at UNBC	Prince George	NBC	3
Thompson River University Horticulture Gardens	Kamloops	TO	3
Victorian Garden Gate Manor B&B and Gardens	Sayward	VI	3

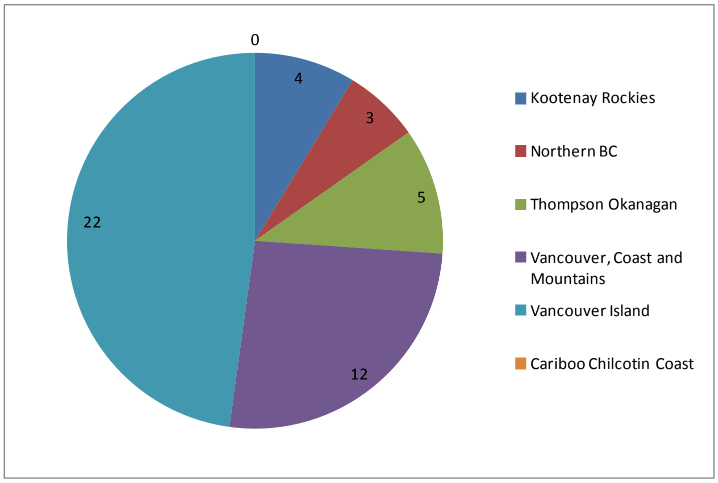
Product Offering

A more detailed review of the 47 gardens listed above provides an overview of the product offering in BC.

Geographic Location

22 of the 46 (46%, not including Communities in Bloom) are located within the Vancouver Island region, 12 are located within the Vancouver, Coast and Mountain Region (26%), five within the Thompson Okanagan region (11%), four within the Kootenay Rockies (9%) and three within Northern BC (7%)(Figure 7).

Figure 7 - Geographic Location of BC Gardens



Source: BC garden tourism sector product inventory

Ownership

Of the 47 gardens, 13 are privately owned (28%) with the rest being publically owned, which includes universities, non-profit societies, museum and heritage parks and municipal or provincial parks.

Garden Type

The following types of gardens are included within the BC garden tourism sector offerings.

- Arboretum
- Botanical gardens/rainforest
- Chinese gardens
- Community gardens
- Cut flower gardens
- Demonstration gardens
- Edible herb gardens
- Educational gardens
- Floral show gardens
- Flowering grasses, shrubs, trees
- Food gardens
- Formal gardens
- Garden centre and country store
- Heritage gardens
- House, hotel or accommodation with gardens
- Italian gardens
- Japanese gardens
- Lavender farm
- Native plant gardens
- Novitiate gardens (perennial and herb garden)
- Orchards
- Rhododendron gardens
- Rock gardens
- Tropical/Indoor gardens
- Woodland gardens

Admission Price

Of the 47 gardens, 24 do not charge any admission (51%), 14 do charge admission (30%), five do not charge admission but provide access only to guests (11%) (e.g., wedding venue, stay at accommodation), and three request a donation (6%).

Of the 14 gardens that do charge admission, prices range from $5.00 to $30.80, with most falling within the $8.00 to $12.00 range.

Packaged Offers

Four of the 47 gardens (9%) offer some kind of packaged offer with their admission. Packaged offers include accommodation, transportation, other attractions or tea service.

Seasonality

35 of the 47 gardens are open year round (74%). Of those that are not open year round, months of operation are typically April or May opening and September or October closing.

Tours

Of the 47 gardens, 26 offer garden tours (55%), of which three are self-guided. Some tours are scheduled for set times whereas some are only offered to groups by advance request.

Food and Beverage Services

In total, 19 of the 47 gardens (40%) offer some type of food and beverage service, the most common being tea service and/or cafés or restaurants.

Gift Shop

15 of the 47 gardens (32%) have gift shops on site.

Events

Most gardens host some kind of event during the year, with 31 gardens offer events at their locations (66%), including art shows, garden workshops, plant sales, Christmas festivities, music, and weddings.

Education

22 of the 47 (47%) gardens offer some kind of educational opportunity. Most educational offerings are gardening workshops, but may also include general interest and knowledge such as beekeeping, fine arts, cooking or arts and crafts.

Other on-site attractions and activities

Most gardens offer some other attractions and/or activities as part of the garden experience. The following list includes those offered by the 47 garden operators reviewed:

- Accommodations
- Art gallery
- Beaches
- Wildlife watching
- Boat tours
- Carousel
- Chapel
- Children's playground
- Fireworks
- Garden sculptures
- Geocaching
- Gift shop
- Hall rentals
- Heritage houses or castles
- Historical displays
- Interpretive Centre
- Labyrinth
- Library and Resource Centre
- Local walking tour of Chinatown
- Nursery or floral shop
- Outdoor concert bowl
- Petanque
- Picnic area
- Spa
- Tai chi
- Tea ceremony or service
- Trails and hiking
- U-pick flowers and food
- Visitor centre
- Winter ice rink
- Yoga

Nearby Attractions and Activities

A review of the nearby attractions of the 47 garden operators shows some similarity in complementary product offerings within an approximate five km range from the garden. In particular, museums, heritage sites, farms, shops and galleries and wineries were most noted. For the more urban gardens, the list also included their city attractions and activities. Note: only those attractions or activities noted for two or more garden operators were included below.

- Bird sanctuary
- Farms and orchards
- Fishing
- Golf courses
- Heritage sites
- Hot Springs
- Kayaking
- Local food markets
- Museums
- National and Provincial Parks
- Oceans, lakes and beaches
- Shops and galleries
- Small destination towns
- Spas
- Surfing
- Theatres
- Universities
- Vancouver and attractions
- Victoria and attractions
- Whale watching
- Wineries

Gardens BC Membership

Of the 47 gardens, 12 are members of Gardens BC (25%).

Product Partnerships

The following lists the elements within the garden industry that enhance the garden tourism section in some way. While these are not considered garden tourism products on their own, they are a valuable part of the product experience overall.

Landscapers and trade	• Landscapers and trade associations assist with the product creation and development. • The BC Landscape & Nursery Association (BCLNA) represents more than 800 member companies, representing nursery, landscape, retail, education, supply, service, and government organizations working in the landscape horticultural industry. According to the BCLNA members generate $635 million in sales and $432 million in payroll. • The British Columbia Society of Landscape Architects (BCSLA) is the regulatory body for landscape architecture in BC under the Architects (Landscape) Act, including public health, safety and welfare as it relates to the professional practice of landscape architecture. • The Garden Design Group is an association of professional garden designers who practice in Western Canada. • BC GreenHouse Builders is a private company that builds greenhouses.	• Landscapers • Nurseries
Retail	• Throughout BC, there are multiple garden stores, gift shops and retail stores that sell garden themed products.	• Retail shops • Gift Shops • Fashion
Educational Institutions, skills training and employment	• Many education institutions in BC offer garden and horticulture courses, including UBC, Royal Roads, UNBC, Kwantlen College, Okanagan University College, Camosun College, Surrey College, Vancouver Training Institute, Pacific Design Academy, and Pacific Horticulture College. • Includes certificate, diplomas, degrees, and continuing studies. • Many offer on-campus research gardens.	• Horticultural • Research • Academics
Community Groups and Clubs	• The BC Council of Garden Clubs represents 191 clubs focused on gardens, representing 19,300 gardeners. Many of these are specific in nature, e.g., Vancouver Dahlia Society, Nanaimo Rhododendron Society, and Okanagan Xeriscape Association. (www.bcgardenclubs.com/membership.html)	• Community horticultural groups • Garden clubs
Gardening	• The Canadian Garden Tourism Council is the	• Canadian Garden

Organizations and Associations	national umbrella body for provincial Garden Tourism Coalitions. (See Marketing on page 57 for further information.) • Communities in Bloom is a Canadian non-profit organization committed to fostering civic pride, environmental responsibility and beautification through community involvement and the challenge of a national program, with focus on enhancing green spaces in communities. (See Marketing on page 57 for further information.) • The Master Gardeners Association of BC (MGABC) is an affiliation of local chapters of master gardeners. Master Gardener volunteers are represented in six different regions of the Province. Their mandate is to provide quality, research and science based information to Home Gardeners in a variety of settings.	Council • Communities in Bloom • Master Gardeners
Travel wholesalers	• Travel wholesalers offer garden experiences through their packages travel tours, local, national and international. • Of the travel trade tours, few if any are specific to gardens but include gardens as stops within a more general destination tour. (See Marketing on page 57 for further information.)	• Tour groups – inbound and outbound
Online Garden resources	• A google search of gardens reveals there are more than 1 billion websites with garden content. • There are millions of websites and blogs with garden content, videos, tips and photos. My Garden School list some of the top websites and blogs for gardeners, including BBC, Blotanical, Dave's Garden, Eden Makers, You Grow Girl, The Galloping Gardener (travel), Garden Guides, Gardenweb, and Talking Plants (travel). (www.my-garden-school.com/worlds-top-100-gardening-websites/)	• Websites • Reference Sites • Blogs • Social Media
Media	• BC Home and Garden is a bi-monthly magazine with a circulation of 35,000. • Canadian Gardening is a monthly magazine with 4.5 million impressions between all channels (print, online). The April 2014 issue featured Parksville and Qualicum Beach in the road trip feature. • Home and Garden TV (HGTV) reaches 98.9 million households annually, with 70 million monthly viewers and 4.4 million online unique visitors.	• Garden publications • Journalists and writers • Garden TV
Crossover / Complementary Activities and	• The garden product and experience can be enhanced with the inclusion of crossover activities; either as part of the on-site garden operation (e.g.,	• Culinary - food and beverage on site • Agritourism

Sectors	wine tastings in the garden) or to complement a garden visit with another complementary activity in the proximity (e.g., packaged itineraries including gardens and wineries).	• Wine industry • Art and Cultural activities, e.g., museums • Health and Wellness • Wildlife viewing • Accommodations • Photography • Weddings
Education and Community Outreach	• Many garden operators include education and community outreach as part of their product experience, in particular there has been an increase in education for sustainability and personal food gardens.	• Water conservation • Green, sustainable • Native plant movement • Disenfranchised populations • Endangered species and conservation
Transportation Systems	• Transportation systems are required to ensure visitors can access the garden product experiences throughout BC.	• Air travel • Car rental • Ferries
Other Destinations	• Other garden tourism destinations can work cooperatively together to create a larger, more appealing product experience / destination for garden visitors.	• Washington • Oregon • California
Endowments	• Gardens can be costly to maintain and financial support helps with product maintenance and development.	• Endowments

Challenges of the Garden Tourism Product

The following product specific challenges and issues were identified by the garden tourism sector stakeholders at the January 24, 2014 Planning Meeting #1.

- There are some garden products that don't see themselves as a part of tourism.
- Gardens face capacity issues – the experience gets destroyed if too many people are there.
- Seasonality of garden product offering.
- Viability to keep the product fresh – hard to find "garden artists" to do it.
  - Gardens will be more expensive to run in the future. Inventory will shrink – 50 gardens are struggling in BC and some unique garden experiences are at risk.
- Decline of university gardens.
  - Many botanical gardens are university based. However, there is very little interest in the subject and no graduating taxonomists in North America (that we are currently aware of). There will be large collections with no one to curate or care for them.
  - Gardens are a scientific foundation to many things, but with no resources to manage in the future gardens will be dependent on experts outside the country.

    - Climate change combined with the death of taxonomy is a serious challenge at the intersection.
- Land value can be too expensive vs opportunity costs for other development, e.g., housing.
- The majority of garden products are in southern BC. Northern BC has some great product assets but they are different than in Southern BC.
- Decline and change in volunteer sector due to aging volunteers without replacements. Volunteers are critical for success of gardens.
- Finding skilled labour. Although this is a challenge for parts of the tourism industry in general, it is different for garden tourism as the roles are physically challenging, require training and practical experience and some want to earn more money than "working in a garden".
- Government is looking at getting rid of foundation courses required to provide base skills and knowledge.

Garden Tourism Sector Representation

The BC garden tourism sector is represented by Gardens BC (officially BC Garden Tourism Coalition), which was formed in 2008. Gardens BC is a non-profit society with the purpose to foster the growth and interest in the garden experience of British Columbia. Currently, there are more than 10 members.

As an organization in its infancy, efforts to date have been focused on increasing membership, ensuring the value of the society to members and participating in the Destination BC Experience BC tourism sector planning program.

The objective of Gardens BC is to increase garden visitation among their members.

Activities of Gardens BC include:

- Marketing & Cross Promotion: The Gardens BC website provides a link to each individual garden, and each individual garden is linked back. This linking allows web visitors to easily see which high-calibre BC gardens are well worth visiting.
- Networking & Knowledge Sharing: The Coalition meets three to four times a year either in person at member gardens or via conference call. In addition to discussing the group's objectives these meetings serve as an opportunity for members to discuss their personal business challenges and successes.
- Local & Global Exposure: Acceptance into the Destination BC Experiences BC program means that member gardens will compose the new 'Garden' sector within BC. With this designation Gardens BC can receive provincial financial support to pursue our activities, have a much stronger marketing position and be readily visible to local and international garden enthusiasts.

Future Marketing Initiatives that have been identified:

- Improved website layout, design & search capabilities.
- Cross-promotional rack cards for local and national distribution.
- Cross-promotional discount programs encouraging guests to visit a number of our members.

- Representation in the 2017 National Gardens Festival (Ontario).
- Involvement in the 2017 International Horticulture Exhibition (Flora Niagara Canada 2017).

Key Insights

It is critical the definition for the garden tourism sector is finalized to ensure marketing and development efforts within the Strategic Plan are being focused to achieve results.

Few garden operators offer packaged offers. However, consumers tend to look for special deals, value-adds and packaged itineraries or products. There may be opportunities to develop new packaged offerings to enhance the product appeal.

Currently, only 30% of known garden tourism operators charge admission fees, 40% offer food and beverage service and 30% offer retail sales. If the objective of the garden tourism sector is to grown the garden tourism industry revenues, then currently less than half of the gardens would support that objective. Potentially there can be levels of focus, with primary focus on those garden operators that produce revenues, and secondary focus on the garden operators that enhance the overall destination experience and appeal.

Most gardens in BC offer other attractions, activities, tours and events in addition to the physical greenspace. Increasing the promotion of these activities throughout BC may be a way to appeal to a larger market audience.

A significant percentage of the gardens are open year round. This may not be the consumer perception and marketing efforts may be able to change perceptions of the off-season visitation.

There are significant and passionate garden partners that could be leveraged for the garden tourism sector in BC.

7. Garden Visitor Characteristics

This section summarizes the information available on garden visitor characteristics, with much of the data drawn from the 2006 Travel Activity and Motivation Survey (TAMS). This study examined the recreational and travel activities of Canadians and Americans who participated in out-of-town, overnight travel in 2004-2005.

A US sector report on those who had visited garden theme attractions provides significant insight, though a Canadian sector-specific version is not available. For the purpose of this review, it will be assumed that overall profile trends will be similar across both US and Canadian garden visitors.

Numbers and Origin

During the TAMS survey period, it is estimated that 10.5% of *all* adult Americans visited a garden theme attraction (botanical garden, garden theme park, or both) while on an out-of-town, overnight trip of one or more nights.

The following table presents garden theme attraction visitation among both US and Canadian pleasure travellers (Figure 8).

Figure 8 - Incidence of Visiting Garden Theme Attractions

	US Pleasure Travellers (total) 170,510,241	CDN Pleasure Travellers (total) 18,439,508
Number - Visited Garden Attraction		
Garden theme attractions (all activities)	23,307,038	3,246,208
Visited botanical garden	20,119,229	2,675,275
Visited garden theme park	7,146,034	1,281,626
Visited both	3,958,224	710,693
% - Visited Garden Attraction		
Garden theme attractions (all activities)	13.7%	17.6%
Visited botanical garden	11.8%	14.5%
Visited garden theme park	4.2%	7.0%
Visited both	2.3%	3.9%
Number - Garden is Main Reason for Trip		
Garden theme attractions (all activities)	4,804,719	-
Visited botanical garden	3,703,159	465,413
Visited garden theme park	1,905,558	223,402
Visited both	803,998	-
% of Total Travellers - Main Reason for Trip		
Garden theme attractions (all activities)	2.8%	-
Visited botanical garden	2.2%	2.5%
Visited garden theme park	1.1%	1.2%
Visited both	0.5%	-
% of Garden Visitors - Main Reason for Trip		
Garden theme attractions (all activities)	20.6%	-
Visited botanical garden	18.4%	17.4%
Visited garden theme park	26.7%	17.4%
Visited both	20.3%	-

Source: TAMS 2006 – US Activity Profile – Visiting Garden Theme Attractions; Destination BC-provided TAMS data file

Overall, 13.7% of US and 17.6% of Canadian pleasure travellers had visited a garden theme attraction (botanical garden or garden theme park). In both countries, visitation was higher for botanical gardens than garden theme parks.

Among all pleasure travellers, very few indicate that visiting a garden theme attraction was a primary reason for taking a trip (only 2.8% of US pleasure travellers). Of course, this percentage is significantly higher when looking only at those who visited a garden theme attraction, with 20.6% of US garden visitors indicating this was a main reason for at least one of their trips in the past two years.

Data is available in Appendix 2 focusing on US and Canadian pleasure travellers who had been to BC. Both show a higher propensity for botanical garden and garden theme attraction visitation, though it should be cautioned that we can not make a direct linkage to garden visitation in BC (only that those who had *been to* BC had a higher likelihood for garden visitation to any location in general).

Compared to the average US pleasure traveller, garden theme attraction visitors are over-represented among those living in Alaska and the Pacific and Middle Atlantic regions of the US. Of particular interest to the BC market is the Pacific region, with estimated visitation as follows (Figure 9):

Figure 9 - Garden Attraction Visitation - Pacific Region

State	Population of State	Estimated Number who Visited Garden Attractions	% of Pleasure Travellers	% of Population
Alaska	484,754	85,384	20.2%	17.6%
California	26,965,837	3,297,775	15.0%	12.3%
Oregon	2,793,303	295,379	13.7%	10.6%
Washington	4,770,549	572,073	15.0%	12.1%

Source: TAMS 2006 – US Activity Profile – Visiting Garden Theme Attractions

Regarding where they travel, those who had visited garden theme attractions in the past two years were much more likely than the average US pleasure traveller to have taken trips to Canada (28.5% vs. 12.4%), with the most common destinations being Ontario, BC and Quebec.

Garden visitors also gave higher ratings than the average traveller on the overall appeal of all Canadian destinations, with BC receiving the highest appeal score of all provinces at a 7 out of 10.

Demographic and Lifestyle Profile

Demographic Profile

In general, those with a propensity to visit gardens tend to be female, older, have relatively high levels of education and enjoy above-average household incomes. These are repeated trends found in a variety of information sources, including studies referenced in the book *Garden Tourism* by Richard Benfield.

With the TAMS report being the most recent of information, analysis will focus on data from this study only.

The following table compares the demographic profile of a garden attraction visitor against the average US pleasure traveller and provides an index to indicate the extent to which garden visitors are over- or under-represented (Figure 10).

Figure 10 - Demographic Profile - Garden Theme Attraction Visitors vs. All US Pleasure Travellers

Attribute	Size of Market	Visited Garden Attractions 23,307,038	Total Pleasure Travellers 170,510,241	Index
Gender	Male	47.2%	48.5%	97
	Female	52.8%	51.5%	103
Age	18-24	6.9%	10.8%	64
	25-34	18.9%	21.0%	90
	35-44	15.8%	17.3%	91
	45-54	22.1%	21.0%	105
	55-64	20.2%	15.5%	131
	65+	16.0%	14.4%	111
Average Age		*47.9*	*45.4*	
Marital Status	Not married	26.0%	30.5%	85
	Married	74.0%	69.5%	107
Parental Status	No children under 18	75.7%	70.0%	108
	Children under 18	24.3%	30.0%	81
Education	High school or less	12.5%	20.5%	61
	Trade/tech/commun. col.	19.3%	21.4%	90
	University degree	42.5%	41.1%	104
	Post Graduate degree	25.7%	17.1%	150
Household Income	Under $20K	5.5%	8.1%	68
	$20K to <$40K	12.4%	16.2%	77
	$40K to <$60K	16.3%	16.7%	98
	$60K to <$80K	15.5%	14.7%	106
	$80K to <$100K	13.0%	11.6%	112
	$100K+	26.3%	21.1%	125
	Not stated	11.0%	11.7%	95
Avg. Household Income		*$83,478*	*$74,303*	

Source: TAMS 2006 – US Activity Profile – Visiting Garden Theme Attractions

These demographic trends hold among Canadian garden theme attraction visitors, with these travellers also tending to be female, 45 years or older, married without dependent children, and well educated with above average incomes[28].

Research conducted by Benfield seems to support these general trends of the typical garden visitor being more likely to be female, over 50, well educated and with above average income[29]. (Benfield has also presented information that shows people first become interested in gardens at ages 25, 30 or 40, although there is no correlating information that translates these to garden travel demographics).

Lifestyle Profile

Overall, those who visited garden theme attractions were more likely than the average US pleasure traveller to participate in a wide variety of culture and entertainment activities, both while travelling and at home. Looking specifically at their activities while travelling, garden visitors were most likely to have participated in the following other activities:

- Shopping and dining – 94.2%
- Historical sites, museums and art galleries – 86.1%
- Theme parks and exhibits – 78.8%

Compared to the average traveller, they over-index (or show a particular interest) in attractions with an educational theme (e.g. science and technology exhibits, agro-tourism, aboriginal cultural experiences), as well as high art performances and theatre, film and music festivals, and activities related to fine cuisine (e.g. fine dining and spa visits, wine, beer and food tastings).

Similar to cultural and entertainment activities, those who visited garden theme attractions were also more likely than the average US pleasure traveller to pursue a variety of outdoor activities, again both while travelling and at home. While on trips, garden visitors were most likely to have participated in the following activities:

- Wildlife viewing – 65.8%
- Ocean activities (e.g. swimming, kayaking) – 54.8%
- Hiking, climbing and paddling – 41.6%

While wildlife viewing is a top activity overall for garden visitors, it is also an activity where they over-index significantly compared to the average pleasure traveller (with only 35% of them participating). Other activities where garden visitors over-index substantially over the average traveller included cycling, horseback riding, and sailing and surfing.

In terms of outdoor activities at home, the majority in this segment pursue gardening at home as an outdoor activity (67.1% compared to 53.1% of average US pleasure travellers).

[28] Source: Expression of Interest Application for Experiences BC, BCGTC, March 2012
[29] Source: Garden Tourism, Richard Benfield, 2013, pg. 172

Looking at media consumption, those who visited garden theme attractions were more likely to consume travel-related media compared to the average US pleasure traveller. This includes the travel section of daily (57.2%) or weekend (65.6%) newspapers, travel magazines (21.1%), travel programs on TV (44.7%) and visiting travel-related websites (63.5%).

Accommodation and Travel Information Sources

Accommodation, Tours and Cruises

Among those US travellers who had visited garden theme attractions, a third (33.5%) had stayed in seaside resorts, making it the most popular type of accommodation stayed in while on trips. Other popular accommodation choices were:

- Public campgrounds in a national, state, provincial or municipal park - 24.8%
- Lakeside/riverside resort – 24.2%
- Ski or mountain resort – 16%
- Private campground – 15%

Relative to the average US pleasure traveller, those who had visited a garden attraction had a much greater propensity to stay in accommodations that featured a fine cuisine component, such as health spas, country inn with gourmet restaurant, and cooking and wine tasting schools.

Those who visited garden theme attractions were much more likely than the average US pleasure traveller to have taken tours and cruises of all types. The most popular types of tours for this segment were:

- Self-guided sameday tour (while on overnight trip) – 34.9%
- Organized sameday tour (while on overnight trip) – 31.7%
- City tour – 31.5%
- Scenic countryside drive – 27.9%

The most popular type of cruise taken was a Caribbean cruise (13.5%), followed by other ocean cruises (8.6%).

Travel Information Sources

When planning a trip, those who had visited a garden theme attraction were more likely than the average US pleasure traveller to consult a variety of information sources, with the most popular being the Internet (84%), reflecting on past experiences/trips (63.7%) and word-of-mouth (55.2%). Maps (47.8%), official travel guides/brochures from state/province (37.9%) and auto clubs such as AAA (36.9%) are also frequently consulted sources of information.

Compared to the average pleasure traveller, garden visitors were particularly more likely to consult official tourism sources (official guides, visitor info centres), articles and ads in newspapers or magazines, travel guidebooks and television programs.

Research by the Travel Industry of America[30] found that 24% of garden travelers had consulted some type of home and garden magazine for travel ideas in the past five years, with Better Homes and Gardens being the most popular. That magazine had a subscriber base of 7.6 million in 2011, placing it at the third most popular magazine in the US.

Looking specifically at the role of the Internet in trip planning, a majority of those who visited garden theme attractions while on trips are using the Internet to actually book part of their trip (60.6% compared to 48.9% of the average US pleasure traveller). A further 18.7% use the Internet for planning the trips only.

The most popular trip components to be booked online by garden visitors include air tickets (78%), accommodations (76.7%) and car rentals (48.9%). A third have also booked tickets or fees for specific activities or attractions.

Those who visited garden attractions were more active on consulting all types of websites for trip planning purposes, including travel planning/booking sites (61.9%), hotel/resort websites (61.4%), airline websites (55.6%) and tourism sites of a country/region/city (49.4%). Almost half (45.3%) have consulted the website of a specific attraction.

Less is known about the information sources used to learn about gardens specifically. In an on-going visitor survey at Atlanta Botanical Garden, the top three ways visitors hear about the garden is through word-of-mouth, the Internet and newspapers[31].

Experience and Motivations

Overall Travel Motivations

The TAMS Study revealed the most important benefits sought while on vacation and - similar to the average US pleasure traveller - a majority of garden visitors sought the general benefits of:

- To get a break from your day-to-day environment – 70.2%
- To relax and relieve stress – 70%
- To create lasting memories – 62.2%
- To enrich relationship with spouse/partner/children – 57.8%

More so than the average traveller, however, garden visitors were more likely to seek the benefits of:

[30] Source: *Garden Tourism*, Richard W. Benfield, 2013, pg. 145
[31] Source: *Garden Tourism*, Richard W. Benfield, 2013

- To see or do something new or different – 55.8%
- To enrich your perspective on life – 35.2%
- To gain knowledge of history, other culture and other places – 33.7%
- To stimulate your mind/be intellectually challenged – 29.2%

These more pronounced travel motivators – doing something new, interest in culture, history, education – align well with findings from the Canadian Tourism Commission (CTC). The CTC has developed a market segmentation system called the Explorer Quotient (EQ)[32], which uses psychographics to group people based on the types of travel experiences they seek out.

Their research found that within Canada and the US, traveller appeal for visiting botanical gardens was more pronounced among two specific EQ segments (11):

Figure 11 - Traveller Appeal for Visiting Botanical Gardens

	Canada	US
Overall	*58%*	*56%*
Cultural Explorers	66%	72%
Authentic Experiencers	65%	61%

Source: Explorer Quotient data, Canadian Tourism Commission

Given the particular appeal of botanical gardens among Cultural Explorers and Authentic Experiencers, these two EQ segments are explored in further detail.

"CULTURAL EXPLORERS are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit."

Comprising 12% of the travelling population surveyed, Cultural Explorers share the following key demographic traits and travel values:

- They skew towards females, with higher than average education and average incomes. The largest proportion are aged 35 to 54 and in terms of lifestage, just over half are mature or middle-aged with no kids at home.
- They have a tendency to stay longer, spend more and generally travel in parties of two.
- They are avid travellers who seek opportunities for living the history/culture of a destination, taking in natural beauty, ideally as a shared experience with other like-minded companions.
- They prefer not to be constrained to "tourist" schedules or destinations and prefer a spontaneous approach to seeing the sights. They seek authentic experiences, and are not luxury or comfort-seeking travellers.
- They are more likely than other travellers to be interested in a wide variety of activities, particularly those with an outdoor/nature or learning component.

[32] Source: Canadian Tourism Commission, *EQ Profiles*

- The top three most appealing activities to Cultural Explorers are marine life viewing, wildlife viewing and dining at restaurants offering local ingredients.

"AUTHENTIC EXPERIENCERS are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit."

Certainly, the demographic profile and travel values outlined in the TAMS report align very closely with that of an Authentic Experiencer, with these key traits:

- Authentic Experiencers tend to have higher than average education and are older (53% are 55+), with most being in a mature lifestage or at least with no kids at home.
- They will seek travel experiences that allow them to learn about the ancient history and modern culture of the places they visit, as well as observe the cultural differences between destinations.
- They will avoid "hedonistic" experiences, preferring to live like locals and be in control while on vacation – they don't need to be pampered. They are also not seeking an "escape" but rather travel is about personal development and learning.
- They are more likely than other travellers to be interested in exhibits, architecture, historic sites/buildings and museums.
- Similar to Cultural Explorers, Authentic Experiencers selected marine life viewing, wildlife viewing and dining at restaurants offering local ingredients as the most appealing activities while travelling.

The demographic profiles and travel preferences of both EQ segments have many similarities and also suggest many ways in which the garden tourism sector can seek out partnerships and develop programs that will appeal to their needs and interests.

Garden Travel Motivations & Experience

While there is information to explore the *overall* travel motivations for those who visit gardens, little research has been completed to uncover the specific motivations for visiting gardens while on vacation. In *Garden Tourism*, Benfield has collected results from several smaller-scale studies on this topic:

- Research from a botanic garden in Australia found that the most important reasons for visiting the garden were to enjoy oneself, admire the scenery and spend time with family. There was low level of interest in learning or conservation.
- Similarly, research from the UK showed that factors such as social (28% - enjoying company of others), horticultural (21% - relating to your own garden) and setting (16% - peace and tranquility) explained the majority of visitor motivations, and not education, research or conservation. In this same study, participants were asked on an open-ended basis their reasons for visiting gardens, and "for a day out" (15.1%), "to enjoy a garden" (14.9%), and "for interest" (13.4%) were the most commonly noted.

- In a study at the Olbrich Botanical Garden in Wisconsin, the reasons for visiting were largely to enjoy outdoor beauty (73%), for special events (55%), and to enjoy a day outside (49%). They were less likely to name reasons related to education (e.g. to learn about plants and gardening was 28%).

In terms of experience while at a garden, *Garden Tourism* details the results of a 2005 American Public Garden Association visitor survey, with a resulting sample of approximately 3,000 from its member gardens. The highlights from this research are as follows:

- For most gardens, the surrounding municipal area is the most important source of visitors (with 80% of visitors to larger gardens being from within a 50-mile radius of the garden).
- Most Americans arrived to the garden by car (93%).
- Most visitors (80%) were not members but just over a quarter indicated they would buy a membership if offered.
- There is a slight preference for weekend visitation, and mornings are when they tend to come.
- Once in the garden, almost one-third of visitors stay over two hours, and most stay longer than one hour.
- If there is a gift store, over two-thirds will visit it, but fewer than half will visit a café if present.
- A vast majority (96.5%) say they are likely to return to the garden visited. This relates to the high overall satisfaction with the experience (96%), strong value for money (78%) and above average educational benefit (83%).

Key Insights

The demographic profile outlined by the TAMS study fits with industry expectations/experience of the typical garden visitor – older, child-free, higher education and income. With the Baby Boomer cohort now approaching this lifestage, this is a very appealing demographic segment in which to have a strong position and the needs of this group should continue to be nurtured.

Garden visitors are shown to be very active in their travel habits and participate in a wider variety of cultural, entertainment and outdoor activities than the average traveller. They show a particular interest in educational activities (e.g. agro-tourism, aboriginal cultural experiences), “foodie”-type activities (e.g. wine/beer/food tastings, fine dining) and wildlife viewing, all areas of strength within BC’s greater arsenal of tourism experiences. The garden tourism sector can explore a number of different complementary activities to create the authentic, cultural experience their existing target market is seeking.

If it is believed that the EQ segments (Cultural Explorers and Authentic Experiencers) with a stronger affinity for garden visitation overlay well with the existing visitor base, the needs of these segments would support the development of a self-guided trail or at least further development of the existing Gardens BC website. These segments are found to be more self-sufficient in their travel experience, wanting to chart their own course on their own time.

A review of the available research on garden visitor characteristics reveals a need for more information about motivations for visiting gardens, how this differs among various demographic/lifestyle groups, and barriers among those who do not visit gardens while travelling. This will help the sector reinforce the drivers that are working, and uncover new drivers that will be necessary to move beyond the existing visitor base.

8. Cultivating Our Market Project

The following information has been graciously provided by the Cultivating Our Market project and has been excerpted directly from their reports.

Cultivating Our Market, (COM) is a national marketing initiative of 18 botanical gardens and arboreta across Canada to increase visitorship at and awareness of Canada's botanical gardens and arboreta. The COM project is funded in part by the Canada Cultural Investment Fund of the Department of Canadian Heritage. Royal Botanical Gardens (RBG) is the lead partner in COM.

While this research project did not focus specifically on travellers as visitors, the information assists the garden tourism sector in better understanding current and potential markets.

Cultivating Our Markets Project Survey Master Report

A survey was developed for each of Visitors, Members, Staff, Volunteers and NonVisitors of the 18 participating botanical gardens to "produce empirically-based consumer information and analysis that will directly inform the development of an effective new brand and marketing plan for Canadian botanical gardens and arboreta". This section contains an excerpt of the findings of the survey research component of the COM project, predominantly for Visitors and Non-Visitors.

Key Findings (Total master report – all five surveys)

- Botanical gardens and arboreta in Canada have a tremendous untapped opportunity to better educate Canadians about climate change, nature conservation, and other nature-related topics.
- Overall, knowledge about what botanical gardens and arboreta do is low. This is true even among Members, Volunteers and Staff, among Visitors who visit often, and among Visitors who say education is a main reason why they came to the botanical garden/arboretum.
- At the same time, there is real desire to learn more about nature conservation, growing food, having a home garden, and other nature-related topics. Even NonVisitors are very/somewhat interest in learning more about some of these topics.
- Perhaps disconcerting, large proportions of the surveyed groups believe that concerns about climate change are, to some extent, exaggerated.
    - Higher formal education is associated with greater concern about climate change;
    - Frequent visits to botanical gardens and arboreta are not.

- Many NonVisitors appear to be good candidates for becoming future Visitors. Females figure prominently in this sub-segment.
- There is a clear opportunity to further engage Visitors through educational programming.
    - Visitors are drawn to the beauty and quiet of botanical gardens, but they also visit sites to educate themselves.
    - Visitors have a great desire to learn more about nature-related topics.
    - Visitors of different ages have somewhat different interest s.
- Volunteers see botanical gardens as interesting, beautiful, peaceful and spiritual. Their self-assessed knowledge of botanical gardens and arboreta is relatively high—on par with Staff, and much higher than Members and Visitors.
- Among NonVisitors, there is a sub-segment that may be successfully encouraged to visit botanical gardens/arboreta.
    - Communications should focus on informing this NonVisitor segment about how botanical gardens/arboreta fit with their existing activities and needs, that is, that botanical gardens/arboreta: are green spaces, have provisions for nature walks and exercise, are great for family outings, and provide information on topics of interest, such as nature conservation and growing their own food.
    - Focusing on the beauty and orderliness of botanical gardens is less likely to prompt this segment to visit botanical gardens.
- It may be easier to encourage female NonVisitors than male NonVisitors to become future Visitors as female NonVisitors already:
    - Associate "inspiring," "spiritual," and "great for family outings" with botanical gardens,
    - Strongly agree with positive statements about gardens,
    - Are very interested in some of the topics suggested, and
    - Frequently attend cultural events like going to museums and the symphony – which is link to a higher propensity to strongly agree that beautiful gardens are inspiring.

Key Findings – Visitors

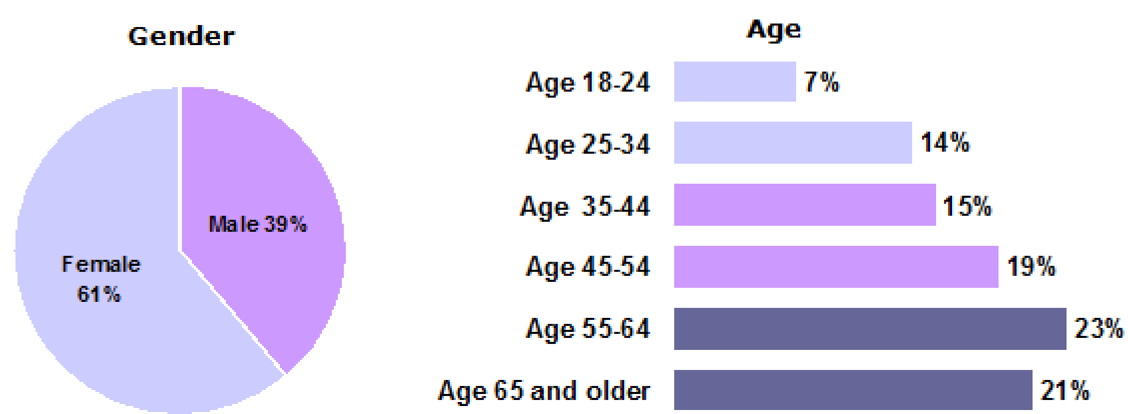
- Visitors are exuberant about their visit and about botanical gardens.
- Nearly all say their visit to the site was "wonderful" or "very good."
- They are drawn to the beauty and quiet of the gardens, but also came to the site to educate themselves.
- Most Visitors are interested in a variety of topics related to nature with nature conservation and growing plants or having a garden at home topping the list.
    - The level of interest in each of 8 topic presented varies somewhat by age.
    - Men and women have similar interests.
- In spite of Visitors' strong interest in education related to nature and the site, 4 in 10 Visitors to a botanical garden say they only know a little, almost nothing, or nothing at all about what a botanical garden does, and 5 in 10 of Visitors to an arboretum say they only know a little, almost nothing, or nothing at all about what arboretum does.

- Only half of Visitors strongly disagree that concerns about climate change are exaggerated.
- There is a clear opportunity to further engage Visitors through educational programming.

Demographics - Visitors

- In general, Visitors surveyed tend to skew towards female (61%) over male (39%). Age tends to skew older, with 44% of those surveyed over the age of 55 (Figure 12).

Figure 12 - COM Survey - Gender and Age - Visitors

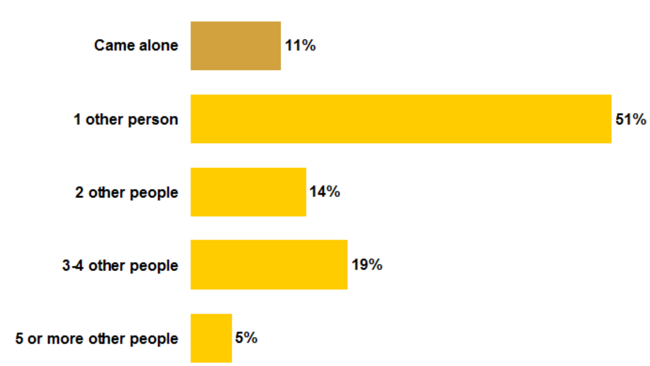


Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Party Size – Visitors

1 in 10 Visitors came to the site alone. Half came with one other person. Among Visitors who came with someone else, most (60%) came with a spouse, partner or date; 24% came with a child age 17 or younger (Figure 13).

Figure 13 - COM survey - Party size - Visitors

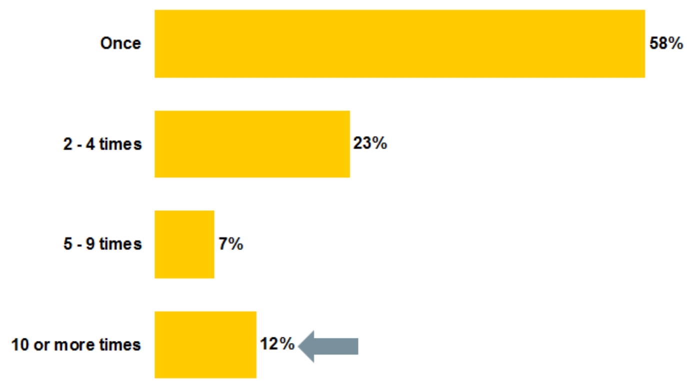


Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Frequency – Visitors

For 58% of Visitors, this was their first visit to the site in the past two years. 12% of Visitors, however, had visited the site 10 or more times (Figure 14). A large majority of Visitors (85%) had also visited a different botanical garden or arboretum in the past two years; 27% had done so five or more times.

Figure 14 - COM survey - Frequency of visit over last 2 year - Visitors

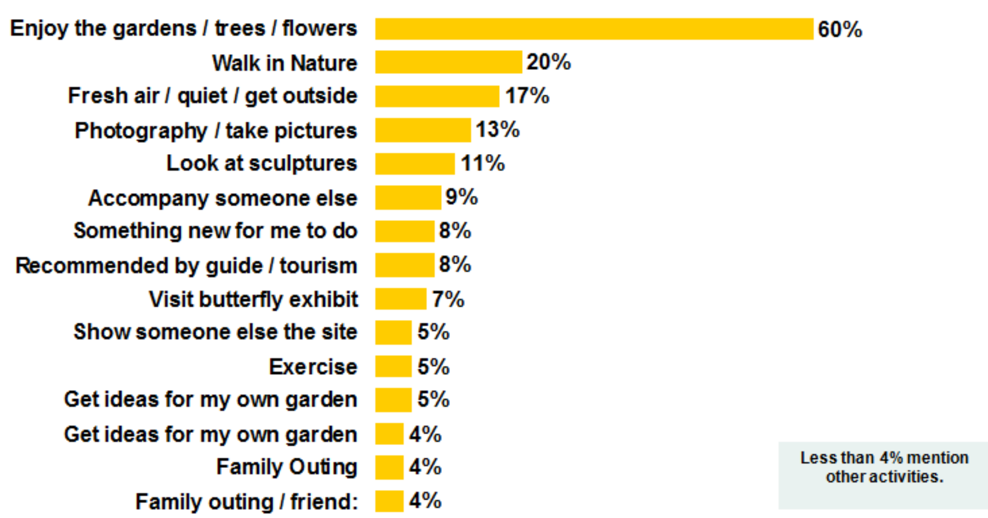


Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Main reason for visit – Visitors

The main reason for coming to the site is to enjoy the garden (60%), following by walk in nature (20%), fresh air/quiet/get outside (17%) and photography/take pictures (13%)(Figure 15).

Figure 15 - COM survey - Main reasons for visit - Visitors

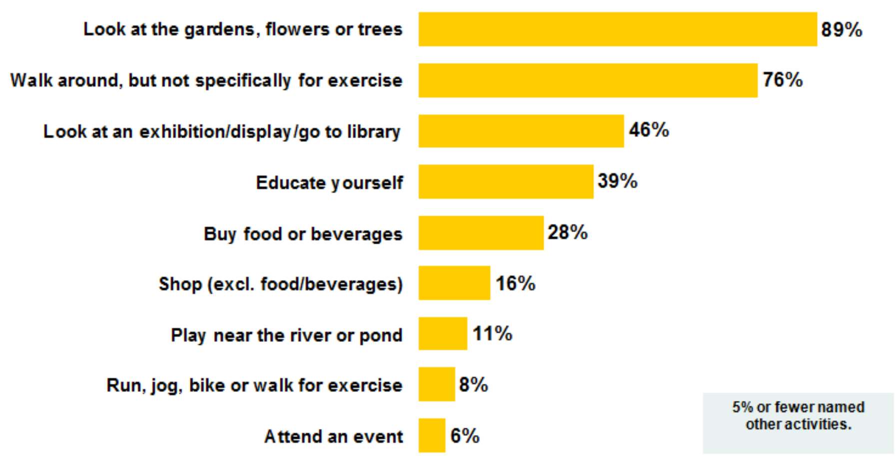


Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Activities on Site - Visitors

While nearly all Visitors looked at gardens/trees (89%) and/or walked around during their visit (76%), many also looked at specific displays, went to the library (46%), or otherwise educated themselves (39%). Nearly one in three (28%) bought food or beverages and one in four shopped (16%)(Figure 16).

Figure 16 - COM survey - Activities on Site - Visitors

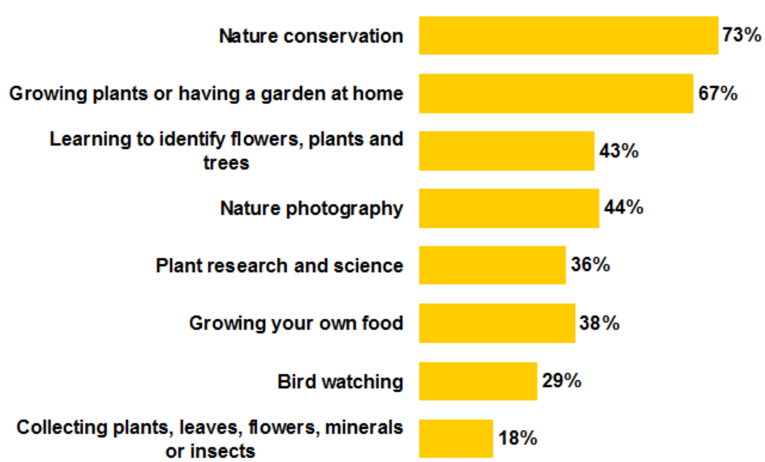


Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Interests – Visitors

Three-quarters of Visitors are very interested in nature conservation (73%), while two-thirds are very interested in growing plants or having a garden at home (67%)(Figure 17).

Figure 17 - COM survey - Interest in Activities - Visitors



Source: Cultivating Our Market Survey Findings Master Report, November 12, 2013, Royal Botanical Gardens

Key Findings – NonVisitors

- NonVisitors know very little about botanical gardens and arboreta.
- A large portion of NonVisitors would not be a suitable target audience for marketing initiatives for botanical gardens and arboreta due to their lack of interest in being outdoors and in topics related to nature.
- There is, however, a notable sub-segment of NonVisitors who regularly visit green spaces, do so for the same reasons that others visit botanical gardens/arboreta, and are very interested in nature conservation, growing plants at home, and growing their own food.
- This NonVisitors in this sub-segment may be successfully transited to becoming Visitors to botanical gardens and arboreta by informing them that botanical gardens and arboreta fit their existing activities and needs: botanical gardens/arboreta are green spaces; have provisions for nature walks and exercise; are great for family outings; and provide information on topics of interest, such as nature conservation and growing their own food.
    - Focusing on the beauty and orderliness of botanical gardens is less likely to prompt this segment to visit botanical gardens.
- Female NonVisitors are much more likely than male NonVisitors:
    - To already associate "inspiring," "spiritual," and "great for family outings" with botanical gardens,
    - To strongly agree with positive statements about gardens (e.g., "beautiful gardens inspire me"), and
    - To be very interested in some of the topics suggested, like growing plants or having a garden at home, organic gardening, preserving garden produce, and learning to identify flowers, plants and trees.
- Female NonVisitors are also more likely than male NonVisitors to frequently enjoy cultural events like going to museums and the symphony. Attending these cultural events frequently is linked to a higher propensity to strongly agree that beautiful gardens are inspiring.
- While older adults express a lot of interest in various topics related to nature and gardening, they are less likely than younger adults to regularly visit green spaces.
- And while university graduates are disproportionately likely to visit green spaces, they are less likely than others to find beautiful gardens inspiring.

Attitudinal Segmentation

The COM project research also included an Attitudinal Segmentation, also called psychographic segmentation, which is created from a clustering analysis. This process groups together survey respondents with similar responses to attitudinal questions. Each segment has its own unique set of attitudes, behaviours, and demographic characteristics.

Segments

There were five segments identified within the Attitudinal Segmentation:

Garden Enthusiasts

SUMMARY: Enthusiastic about gardens, very concerned about global climate change, take action personally to help protect the environment.

- Inspired by beautiful gardens; love orderliness of botanical gardens.
- Feel they know a lot about botanical gardens /arboreta.
- Very concerned about global climate change and believe that scientists, botanical gardens and their own actions make a difference.
- Very interested in growing plants at home and in learning more about nature conservation and organic gardening.
- Visiting botanical gardens is a spiritual experience, but botanical gardens are also seen as a fun place for kids and a great place for family outings.
- Exercise outdoors and are engaged in many physical activities
- Largely female, and disproportionately age 55+.

Worry-Free Enthusiasts

SUMMARY: Members of this segment are very engaged in physical and cultural activities. Like the Guardian Enthusiasts, they are very keen on gardens, but this segment believes concerns about climate change are exaggerated.

- Love the beauty of gardens, exercise outdoors, and encourage friends and family to do outdoor activities with them.
- Highly engaged in both physical and cultural activities and events.
- Less likely than Guardian Enthusiasts to see the importance of botanical gardens as guardians and environmental stewards.

- Very interested in bird watching, growing plants, pest control etc.; moderately interested in learning more about nature conservation and about organic gardening.
- Skews female and older.

Inspired Soloists

SUMMARY: For members of this segment, botanical gardens are a peaceful, inspiring, and an escape from city life that they enjoy… alone.

- Enjoy the peace and beauty of botanical gardens, but emphatically do not encourage friends and family to join them.
- They are very inspired by botanical gardens, but not have a strong spiritual connection to them.
- Very concerned about climate change and highly value the environmental stewardship of botanical gardens.
- Very interested in identifying plants and flowers, growing plants themselves, pest control, and bird watching, and say they are very knowledge about botanical gardens and arboreta.
- Less physically active than the two Enthusiast groups.
- Go to the movies, but not particularly engaged in cultural activities.
- Disproportionately female, age 55+, and university graduates.

Not into Gardens

SUMMARY: Members of this segment know a moderate amount about botanical gardens and don't want to learn more. They think botanical gardens are boring.

- Feel that botanical gardens are boring and not a fun place for kids. This segment may be put off by the orderliness of botanical gardens.
- Divided in their views on whether or not concerns about climate change are exaggerated. Believe scientists cannot do anything about it anyway.
- Don't find any of the suggested attributes of botanical gardens to be very important.
- Go to movies and music concerts, but otherwise have only a moderate level of engagement in physical and cultural activities.
- About even male and female; skews younger.

Inactive Homebodies

SUMMARY: This segment does not engage in outdoor activities, nor in other physical or cultural activities.

- Do not seem to exercise, and do not engage in physical and cultural activities, including going to the movies. Give the impression of being 'homebodies.'
- Not at all interested in learning about botanical gardens, gardening, nature photography, etc.
- Reject the idea of botanical gardens being spiritual.

- Tend to believe that global climate change is a concern and that scientists can play a role in protecting the environment, but don't see botanical gardens as environmental stewards.
- Skews slightly female and younger.

Key Insights

There are opportunities to engage new local audiences (local and near-in markets) in the garden tourism experience. In particular, education programs appear to appeal to a wide audience, specifically the desire to learn more about nature conservation, growing food, having a home garden, and other nature-related topics.

The Guardian Enthusiasts, Worry-free Enthusiasts and Inspired Soloists have all been identified as good target audiences. BC could adopt the recommendations of the report to tailor key messaging to each of the three segments. "The Guardian Enthusiasts will respond well to environmental protection messaging. The Worry-free Enthusiasts will respond well to messaging about enjoyment of the beauty of the gardens along with friends. The Inspired Soloists will appreciate exercise and learning opportunities that they can do by themselves."

An important criteria for new markets is to ensure there is a predisposition to outdoor activities. This lends itself well to the garden tourism sector working with other soft outdoor travel activities (crossover/complementary) to engage new markets.

9. Summary Research Findings

Existing Research

In addition to the overarching tourism and consumer trends that impact garden tourism, there are several recurring trends specific to gardening and garden management that warrant further exploration. A summary of other research relating to these trends is presented in this section.

Gardening is Big Business & Food Production is a Category Driver

Recent results from the 2013 National Gardening Survey[33] showed a rebound in gardening participation, though a decrease in per household spend. Some key findings from this study were:

- 85 million (or 72% of US households) participated in gardening, up from 80 million in 2010.
- Per household spend dropped for the fifth year in a row to $347.
- Sales in the two biggest categories – lawn care and DIY landscaping – has dropped 30% since 2007.

[33] Source: National Gardening Survey: Food Gardening Earns More than Flowers, Today's Garden Center, July 2013; http://www.todaysgardencenter.com/business-management/state-of-the-industry/national-gardening-survey-food-gardening-earns-more-than-flowers/

- There was standout growth in food gardening, container gardening and water gardening categories.
- Participation is highest among those over 55 and 18-34, while 35 to 54 year olds show declining participation and spend.
- The biggest spending demographic group were males under 35.

The overall message is that participation is strong, though spend is shifting away from larger-scale lawn and landscaping work to such areas as food gardening. In Garden Media Group's 2014 Garden Trends report[34], food production was one of twelve key trends they feel will dominate the gardening world this year.

From growing super foods such as quinoa and dandelions, to growing hops for home-brewing ("fermentation gardens") and composting, there is continued and growing interest in gardening for food production, not just aesthetics. Their research revealed that 47 million Americans were planning on growing edibles in 2013.

Double Duty for the Garden

The 2014 Garden Trends report also claims that gardens are increasingly playing a dual role of peaceful escape as well as a social space:

- **Gardens as a way of restoring balance** – People are gaining a better understanding of how gardens can bring a sense of peace, boost productivity and enhance quality of life, as well as provide an escape from a technology intense life. At the same time "they want the garden to do double duty: a Zen oasis and the social hub for entertaining".

- **Gardens as extension of living space** – "The rise of social trends, like lawn games and garden parties, are fueling a record growth in garden furniture and accessories, driving demand for tabletop fountains, outdoor chandeliers, garden art, decorative birdfeeders, unusual planters and candleholders."

Though these trends are specifically related to home gardening, they will impact garden tourism in such areas as merchandise available in garden shops, educational and special event offerings, and displays serving as inspirations for home garden decorating and usage.

Cultivating the Next Generation(s) of Garden Visitors

In a 2011 issue of Public Garden magazine, the topic of diversity was explored at length, specifically the need for public gardens to cultivate a more diverse clientele than the typical white, older, educated female.

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[34] Source: http://blogs.vancouversun.com/2014/01/24/top-12-garden-trends-for-2014/

Recognizing that their core customer base is aging, and that diversifying the base is critical to long-term success, many gardens are developing programs and events to target groups beyond the "older, white female".

As an example, Denver Botanical Gardens has launched several events to reach beyond just the gardening community, including a Garden Grapes and Hops wine and beer event and an event for dog owners. It has also expanded its educational offering to include food production, vegetable gardening and urban farming. A key to their success is "being at the intersection of many relevant content areas".

The Atlanta Botanical Garden has also been very active in trying to attract digital-native Millenials through such events as Cocktails in the Garden, a weekly summer event allowing visitors to enjoy themed drinks and live music and performances.

In addition to Millenials, another key target for many gardens is young families and children. Though families generally show lower garden visitation than other demographic segments, those families with children under 6 have the highest visitation[35]. This is also an opportunity to education children about nature and gardening, in an age where they are becoming increasingly "bio-illiterate[36]". Parents are seeing gardens as safe, clean places where their kids can learn about and explore the outdoors.

To attract this age group, gardens are increasingly featuring "children's gardens" as part of their larger offering, which may include play structures, water features, storybook readings, crafts, games and children's performances. It is estimated that over 60 gardens in the US have some type of children's garden[37].

Though not related specifically to garden visitation, research on this topic revealed a new ad campaign just being launched by MiracleGro, called "Gro Something Greater". It taps into a very broad set of motivations for getting involved with gardening that crosses all demographic groups and could serve as an inspiration point for the BC garden sector to determine how it can broaden its appeal across non-traditional target markets (www.growsomethinggreater.com).

Evolving Gardens' Educational Offering

Traditionally, botanical gardens have had a focus on education, research and conservation but have perhaps failed to embrace the visitor as a key part of fulfilling this mission. Many gardens are now adjusting their educational offerings to appeal to new audiences seeking different information, in a different format. Millenials in particular are looking for an experience, not just information (which is readily available to them) and the traditional "building a perennial border" topic is not of interest.

As explained by the Director of Education for the Denver Botanical Garden, "education that emphasizes aesthetic or academic achievement is out of touch with time-strapped parents, constantly connected

[35] Source: Who Goes and Doesn't Go to Public Gardens, and Why?", Public Garden magazine, 2011
[36] Source: Garden Tourism, Benfield, 2013, pg. 104
[37] Source: Garden Tourism, Benfield, 2013, pg. 180

technophiles and a financially strapped populace. We need to be relevant to a new generation in a new time[38]".

An example of a garden developing a more interactive and relevant educational experience is the Atlanta Botanical Garden, which features cooking demonstrations at its Edible Garden and Outdoor Kitchen.

Blockbuster Events

In an effort to drive visitation and reach out to new audiences, many garden attractions around the world are offering so-called "blockbuster" events. These have included Dale Chihuly glass art installations, LEGO brick sculpture shows (currently booked through to 2016!), and titan arum exhibits (the largest flower in the world).

While some in the garden world are wary of potential cannibalization of the number of future visitors from "sideshows", some gardens have seen great success in driving long-term increases in garden visitation. For example, the Phipps Conservatory and Botanical Gardens in Pittsburgh has seen a sustained increase in visitation since its Chihuly exhibit in 2007.

Future of Garden Tourism

In *Garden Tourism*, Benfield outlines ten areas of new development in garden planning and operations that will help shape the future of the sector:

- **Garden Outreach to the Community** – As the trend toward community gardening grows, public gardens have increasingly become involved in community outreach programs to tap into a potential visitor base. Many of these outreach programs involve financial and/or advisory support for community garden organizations and school outreach programs to increase the engagement of youth in gardening activities.

- **Garden Tourism as a Part of Education for Biodiversity** – International organizations for botanic gardens are beginning to recognize the importance of tourism to botanic gardens and the role it can play in conservation. This is particularly the case where gardens can attract people and then use innovative education programs to engage them and raise awareness of the importance of sustainability and conservation.

- **Relic Garden to Recovery Garden** – This speaks to the refurbishment of former "Gardens of Empire", which were botanic gardens established mostly throughout Europe and the British Empire for experimenting with plants for commercial use. Many of these gardens have fallen on hard times and are beginning to see tourism as major source of funding for recovery efforts (examples of gardens in India and Jamaica are provided).

[38] Source: Gardening is Not Enough, Public Garden magazine, Fall 2011

- **New Botanic Gardens** – Benfield makes note that new gardens continue to be established around the world and private gardens that once were open for short periods of time are increasingly opening for longer periods, if not year-round. There is a notable increase in development in the Middle East, China and Europe (for example, European Union development funds are being used to refurbish gardens in Eastern Europe – see www.culttour.eu).

- **Garden Management in the 21st Century** – This summarizes a framework for defining the “future culture” of botanic gardens in terms of planting the garden (operations, programs and policies, such as green roof design and sustainability practices), leadership and advocacy (e.g. deeper involvement in societal issues such as children’s health), garden operations (funding sources, conservation and sustainability, global outlook, ethnically diverse audience and labour force), conveying new ideas and communicating with visitors, and cultivating communities (including involvement with the historic and cultural community).

- **Gardens as Spectacle** – New gardens are often judged for their “wow” factor, and Benfield provides examples such as Gardens by the Bay in Singapore, a billion dollar, 101-hectare harbourfront development featuring two conservatories. The Eden Project in Cornwall, England is also held up as an example of garden as spectacle, and has as one its primary goals to provide “breathtaking visual drama to stimulate an innovative scientific and learning institution dedicated to explaining human dependence on plants and exploring the myriad issues surrounding sustainable development”. The Eden Project houses the two largest conservatories in the world and two different biodomes, and is now one of the most visited tourist attractions in the UK.

- **Gardens and Tourism Infrastructure – Hotels, Roads and Airports** – This speaks to the growing realization by tourism infrastructure providers, particularly hotels, of the importance of gardens to guests and even visitors in general to the region.

- **Gardens of Indigenous Peoples – Ethnobotany in the Garden –** For the tourism industry, there has been a resurgence of interest in ethnobotany (the study of relationships between people and plants) for educational tourism as well as for the use of indigenous plants in tourists’ own gardens. Examples are provided of the Aboriginal garden at the Royal Botanical Gardens and Domain Trust in Sydney and the First Nations Garden at Montreal Botanical Garden.

- **Gardens, Urbanization and Real Estate –** There appears to be a trend toward greater integration of urban areas and gardens as tourism sites, in part necessitated by increasing world urbanization (by 2050 it is predicted that 70% of the world’s population will live in cities). Examples of successful integration are provided, with the refurbishment of an unused Manhattan rail line (The High Line) being a particularly interesting case study.

- **Gardens for Global Sustainability** – This examines the role of gardens in contributing to a sustainable environment and one of the most important contributions it can make is in addressing plant conservation (particularly protecting plant diversity).

Initial Meeting Results

Further to the above analysis, the following information was gathered at the Garden Tourism sector Planning Meeting #1, as indicators of Global and North American trends impacting garden tourism.

Global trends related to market demand for the garden tourism experience

- Garden sector is growing everywhere globally.
- England has been the lead in garden tourism globally and is still going strong.
  - England has had it as a sector and driving product, but it is not the same case in the rest of Europe, which are just starting to see it as a tourism sector.
- There is big growth in areas that don't have the same access to nature as in Canada, e.g., China.
- There is maturation in the European market where keen garden travellers are looking to travel elsewhere and have the financial ability to do that.
- Global markets are looking for experiences where they can interact in a garden to learn about the garden and have direct hands-on experiences.
  - Consumers are moving beyond just looking at the garden but wanting an experience of engaging and learning.
- In some destinations, there are strong linkages between gardens and culture, e.g. England, where gardens are under the National Trust and the policy foundation is different than in Canada.
  - China and Japan have similar structures to England.
  - In some destinations, gardens hold a strong national value, which is not prevalent in Canada.
- As technology continues to permeate society globally, gardens are seen as a place to go to get away from the digital.
- Advocacy on horticulture is key for botanical gardens and a growing concern.
- There has been an increase globally in building gardens as attractions and destinations in themselves to complement the visitor experience.
  - Examples include Puerto Vallarta botanical garden in Mexico, as a complementary offering to the sun/beach experience, and the Miracle Garden in Dubai. (www.vbgardens.org, www.dubaimiraclegarden.com)
- Global warming and changing weather conditions has and will continue to impact gardens and garden tourism travellers, e.g., visitors looking for green spaces as other places around world are drying out.
- As more destinations participate globally in the tourism economy, more destinations are offering garden experiences, e.g., RHS Garden Holidays brochure with Collette showcases Italy, France, Portugal, South Africa, Japan, New Zealand, USA.

    - In BC's International source markets[39], there are increasingly more other destinations involved than BC / Canada in terms of building interest and demand for their gardens.
- Globally, there has been a greater appreciation for aesthetic for appearance in yards, gardens, compost, balconies, parks, etc.
- It is believed that there is growing demand for garden tourism within countries that have developed garden tourism programs. This is believed to be true for England and Open Gardens Australia, but we don't have enough information to know for sure for other garden destinations.
- Garden experiences globally have focused on evolving to be more beautiful and more experienced based, not display based. Part of this evolution has to build and enhance websites to showcase the experience and inspire interest, e.g., virtual gardens.
- Increase in providing more fun in the gardens to appeal to families.
- Increase in social media use in all markets and encouraging visitors to engage online.
    - Ability to send Smartphone photos is critical and is now a criteria for visiting. Wifi is essential.

North American trends related to the garden tourism product offering

In addition to the global trends, the following are trends identified as being seen within North America specifically.

- North America's core garden tourism market continues to be the 55+ group, Caucasian, upper middle class.
    - Secondary market exists of below 35, with interest in native plants, food plants.
    - Middle group of 35-55 is not engaging, which is consistent with other sectors in BC.
- People more "green" aware.
    - More interested in green living, e.g., compost, gardens, self-sufficiency.
- Interest and participation in food gardening has increased, which particularly is a connection for the younger generation.
- Increased interest in Indigenous people plants, e.g., traditional plant foods and medicines of indigenous peoples – First Nation, Métis, etc.
- Increase in driving attention to gardens through the development of other complementary experiences on-site, e.g., other than flowers.
    - Culinary (appealing to five senses), cultural tours, entertainment, evening light shows.
    - North American audiences expect the flowers to be beautiful but want more: light display, glass structures, e.g., Longwood. http://longwoodgardens.org
    - There is a difference between Fully Inclusive Travel (FIT), who has more flexible time vs Group tours, which are more time-bound. Also, there is a difference in focus for local markets (more entertainment to drive repeat business) vs visitors (more focus on gardens).
- The core passionate group of garden aficionados is believed to be declining. All other groups are transitional.

[39] BC's source markets include BC, Alberta, Ontario, California, Other US, Japan, South Korea, Australia, Germany, United Kingdom and emerging markets China, India, Mexico.

  - Loss of key demographic market due to aging demographics.
  - Younger generations showing passion of gardens through sharing pictures in the garden via social media.
- There is greater involvement in charity and donations, with people giving back corporately and at an individual level.

Key Insights

While the garden sector is on the cusp of welcoming a Baby Boomer influx representing its traditional target market, other research and trends in the garden industry make it clear that changes are being made now to attract and develop new markets to sustain the sector for the long-term.

The BC garden tourism sector will need to create new advocates by ensuring it features events and educational offerings that are evolving to meet new needs and interests. Edible gardens and children's programming are two of the most predominant trends to explore.

Whether "blockbuster" or simply locally-sourced and developed, special events provide an opportunity to draw in non-traditional target markets who may not have other compelling reasons for garden visitation. Once in the garden, however, they may experience other benefits (tranquility, escape, education) that make a return visit more likely.

10. Marketing Efforts

Overall, it is believed by the garden tourism sector stakeholders that low awareness by general public of garden assets and the diversity of garden experiences in BC. The garden tourism sector is promoted by the CTC, Destination BC, Tourism Vancouver Island, and Community/City DMOS, in particular Tourism Vancouver and Tourism Victoria. The primary marketing activities are noted below:

Organization	Marketing Activities
CTC	General • Where applicable, gardens are included in travel content. Website • The Butchart Gardens is featured on the CTC website under the Things to Do, filtered by Nature and Wildlife. Travel Media • Gardens are represented in Travel Story Ideas, e.g., VIA Rail's Garden Route (2013). Signature Experiences • The Butchart Gardens is included in the Signature Series program in BC. Research • CTC does conduct market research that includes consumer destination

	interests and travel activities. • The CTC EQ program also captures garden tourism interests by EQ profile.
Canada Garden Council (CGC)	• The CGC, founded in 2011, is a not-for-profit corporation and the national umbrella body for provincial and national garden organizations. • The Council's mission statement is "to be a platform where provincial, territorial and national garden organizations come together for one common goal of promoting the role and benefits of gardens in our communities." • Membership in the Council includes: the Ontario, B.C. and Maritime Garden Tourism Coalitions, the Québec Garden Association, Going Gardens UK (which markets the Canadian garden experience in Europe), Communities in Bloom and the Canadian Nursery Landscape Association. Website • The CGC created the www.canadasgardenroute.ca website to assist visitors in finding Canada's gardens, garden focused communities and garden experiences. North American Garden Tourism Conference • Since 2009, a biennial Garden Tourism Conference has been bringing together, the garden and tourism (including municipalities and DMOs) sectors from Canada, the USA and around the globe to share their experiences of promoting gardens as part of their destinations. • Historically this Conference is held in Toronto in March, in conjunction with Canada Blooms, the country's largest flower and garden festival. The next one will be in 2015. Garden Tourism Awards Program • The Garden Tourism Awards were launched in 2011 and awarded annually for best practices and excellence in three categories: Canadian Garden Tourism Awards, International Garden Tourism Awards and Top 10 North American Gardens Worth Travelling For. This is the only Awards program in the Garden industry in the world. Canada's Garden Days • 2013 witnessed the first National Garden Day was held in 2013 (www.canadasgardenday.ca) which, henceforth will be in June on the Friday before Father's Day. In 2014 the program will expand to include the full three days of Father's Day weekend — Friday, Saturday and Sunday, June 13 to 15. • Activities are held at Gardens and Garden Centres across the country, geared to gardening enthusiasts, families, schools and visitors. Canada's Garden Days are an opportunity to bring awareness to the importance of public and private gardens, the values of home gardening, the benefits related to gardens and the promotion of their contributions to environmental stewardship • There is currently a private members bill to be tabled in Federal Parliament to make the Friday before Father's Day officially known as National Garden Day.
Destination BC	Website • HelloBC.com lists Gardens in its "Things to Do" section under Parks & Wildlife, with a page of editorial copy featuring many gardens. There are currently 21 businesses listed under the Garden category, 10 companies with Gardens as its primary listing, and 11 with secondary listings. Of these, six are represented in the Travel Deal section of the website.

	• Gardens are also featured in content for communities and Festival & Events sections of the website. • Gardens are highlighted in the publications – Vacation Planner and Outdoor Vacation Guide. Travel Media • Gardens are given the opportunity to be engaged through our Tourism Passport, which is given to provided to key media (and trade) and offers complimentary ad mission to major attractions. Milner Gardens is participating for 2014-15. Travel Trade - International • North America - Butchart Gardens remains the most active garden partner and participates at the following trade shows: Canada's West Marketplace, Rendez-vous Canada, and NT A (National Tour Association in the US) • Butchart Gardens is very supportive of fam tours and included in most Victoria iti neraries (from all markets) • Asia - Many years ago, Japan travel trade attempted to develop garden tours, visiting VanDusen or another garden, to participate in a gardening workshop (making hanging baskets or another craft). Due the tendency of shorter and shorter travel, these types of tours did not gain much momentum and disappeared. Instead, in spring they will take part in blossom tours, but with the focus on flower-viewing rather than hands-on gardening activities. No development of garden tours for the Chinese or Korean markets yet. UK RBG Campaign • Destination BC UK office coordinated a campaign with the Royal Horticulturalist Society in 2013 the UK. The campaign incorporated a travel prize incentive contest. Results included: o RHS Online advertorial package 1,000,000 impressions resulted in 5,571 competition entries. o RHS *The Garden* magazine advertorial circulation 365,502 resulted in 1,525 competition entries. o Yahoo network leaders 3,636,769 impressions resulted in 2,741 clicks, cost per click £1.46 and a click through rate of 0.08. o Mail network MPUs 2,661,041 impressions resulted in 3,580 clicks, cost per click £1.18 and a click through rate of 0.13. o Analysis – both Yahoo and the Mail network performed extremely well. Together generating 6,321 clicks to the RHS landing page. o Adding these elements made a big difference to the final entry total and with a total of 7,096 entries. o Total worked out a 7,096 entries. o Room nights to BC through Trailfinders, the partner in this campaign, were up 13% to BC overall in 2013.
Gardens BC	• Gardens BC is a non-profit society with the purpose to foster the growth and interest in the garden experience of British Columbia. As a relatively new organization, Gardens BC has limited marketing activation to date. • Gardens BC has an annual operating budget of $10,000, with the expectation that 80% will go towards marketing activities, including website listings, printed

	brochure, representation at trade shows, etc. • Efforts have been made to build plans for Canada's 150th anniversary. Gardens BC has proposed a pan-Canadian 2017 National Garden Festival be held in each of Canada's capital cities. "The festival will celebrate Canada's rich garden heritage while leaving a lasting legacy of a "Sesquicentennial Garden" in each city". A proposal has been developed for gardens to be created in each of the capital cities across Canada.
Tourism Vancouver Island (TVI)	Garden tourism sector • Tourism Vancouver Island (TVI) is the only Regional DMO that has specific marketing efforts directed towards the garden tourism sector. • The Vancouver Island Garden Trail website lists 16 Vancouver Island gardens, and includes a map, accommodation and activity listings, and a photo gallery (http://www.vancouverislandgardentrail.com). • For fiscal 2013-14 a 12-page Garden Trail Guide was produced, with 75,000 copies being distributed. The gross production cost is $25,000. • In February and March, 2014 TVI attended the Calgary Home and Garden Show, the Northwest Flower & Garden Show (Seattle) and the Edmonton Home and Garden Show. General • Gardens were also represented in other aspects of the general Touring marketing activities, including Vacation Guide program (print and online) and the Vancouver Island Resident Campaign.
Tourism Vancouver	• Five garden businesses are members of Tourism Vancouver, including: Nitobe Memorial Garden, Dr Sun Yat-Sen Classical Chinese Garden, The Butchart Gardens, UBC Botanical Garden & Greenheart Canopy Walkway, and VanDusen Botanical Garden. Website • TourismVancouver.com has fully integrated garden sector content into virtually all aspects of the consumer website. • Garden businesses are listed as Visitor Activities, Attractions within the consumer, travel trade and media websites. Also, gardens are included in 105 pages of additional content, including features such as 10 Must-See Attractions, 10 Hidden Gems in Vancouver, A Guide to Chinatown and A Near-Perfect 48-Hour Itinerary. Kathy Gibler, Executive Director of the Dr Sun Yat-Sen Classical Chinese Garden is featured in a Local's Insight article. Travel Trade • Gardens are featured in Travel Trade itineraries and Travel Media • Gardens are featured in Media Kits and included in media itineraries. MCIT • The UBC gardens are included as potential venues in the MCIT offerings. • Gardens are featured in the pre- and post- meeting travel, including travel to Butchart Gardens in Victoria.
Tourism Victoria	• Gardens are a key sector for Tourism Victoria, with the prominence of Butchart Gardens. The website states 'Victoria has long been known as the "City of

	Gardens".' Website • Gardens & Parks are a category under Things to Do on the website. There are eight listings on this page, as well as content on local parks and links to other park information. • Butterfly Gardens and The Gardens at HCP were both featured in the Coupons and Special Offers section of the website at the time of writing (25% off admission and 2 for 1 entrance fee, respectively). Publication • The Victoria Vacation Planner features gardens in multiple sections throughout the guide, including Seasonal Celebrations. Eight garden businesses were listed in the Things to Do section under Gardens and Parks. The Butchart Gardens and Hatley Park National Historic Site was listed under Weddings in the Plan Your Trip section. Visitor Centre • Garden brochures are racked in the Tourism Victoria visitor centre downtown (must be purchased by individual garden businesses).
Communities in Bloom	• Communities in Bloom is a Canadian non-profit organization committed to fostering civic pride, environmental responsibility and beautification through community involvement and the challenge of a national program, with focus on enhancing green spaces in communities. • Communities in Bloom distribute awards for various categories annually, including National & International Awards and Outstanding Achievement awards. In 2013, Ashcroft BC won Class of Champions for a community of 1,001-2,000, Qualicum Beach won the Home Hardware *Community Involvement Award*, and Sun Rivers Resort Community won for Natura *Tidiness* Award. • This program increases awareness of the value of gardens and green spaces, enables and influences the development of gardens and green spaces and generates significant exposure annually. • Gardens and gardening activities are marketed through press releases, an online magazine, and social media activities (Facebook).
Individual Businesses	• Most gardens have websites. Some offer information in multiple languages. • Most gardens work with their local DMOs and are represented in trip planning information sources, e.g., website, brochures, destination marketing campaigns and activities. • Most gardens are represented in social media, in particular Facebook. • Most individual businesses (with fees) offer reduced rates for students, seniors, children, family and groups, as well as annual memberships. • Some gardens offer reciprocal agreements, such as UBC Botanical and VanDusen Botanical, offering 20% off on regular admission rates. UBC also offers reduced rates for the following: o BC Council of Garden Clubs 20% off o University Neighbours Association Free o APGA Individual Members Free o Staff of APGA Institutional Members Free o Pacific Spirit Park staff Free

	• Some gardens produce newsletters.
	• Some gardens are marketed by their affiliated organizations, e.g., university gardens.
	• Few of BC's gardens are promoted through travel trade tours. Of the travel trade tours, few if any are specific to gardens but are stops as part of a general tour.
	  ○ International Stage Lines tour to the Butchart Gardens (http://www.islbus.com/tours/Victoria.asp)
	  ○ Collette Tour "Resorts of the Canadian Rockies" and Alaska cruise tours includes visits to The Butchart Gardens (http://www.gocollette.com/tours/north-america/canada/resorts-of-the-rockies)
	  ○ The West Coast Sightseeing Vancouver Walking Tour includes a break at Dr. Sun Yat-Sen Classical Chinese Gardens (http://www.vancouversightseeing.com/vancouver-walking-tours/)

Challenges of Marketing Efforts

The following marketing specific challenges and issues were identified by the garden tourism sector stakeholders at the January 24, 2014 Planning Meeting #1.

- It is believed there is low awareness by the general public of garden assets and the diversity of garden experiences in BC.
- It is believed there is a perception of gardens as being "boring and all the same".
- Generating trial can be a challenge.
- There is no partnership strategy for the garden tourism sector.
    - Crossover activities are key: it is believed garden visitors are more prone to cross over and enjoy cultural activities (e.g., museums, heritage, arts, etc.) rather than hard core outdoor activities (e.g., mountain biking, horseback riding, etc.).
- All tour operators do the same package. BC is underrepresented in travel trade for gardens.
- Consumer mindset - consumers don't think of BC as a place for gardens.
- Gardens can be a low value for travel trade and therefore needs to be high volume to generate the percentage of sale the operator is looking for.
- Lack of itineraries, understanding of how to get to gardens.
- Not seen as a time-sensitive experience. Need to create more urgency.
- Currently, market ready products are selling the destination more than they are selling their site.

Key Insights

There is currently no one general source for gardening tourism information in BC. There is an opportunity to combine all garden tourism experiences content into one website to better represent the diversity and abundance of garden attractions, activities and events.

Most marketing activities incorporate gardens into general destination marketing efforts, either as a Thing to Do, Attraction or natural attraction, e.g., park. As such, gardens can often be difficult to find in trip planning tools, unless the visitor uses a search term. The exception to this is Tourism Victoria, where gardens are featured prominently, and Tourism Vancouver Island, who have a specific marketing initiatives focused on the garden market.

The 2013 Destination BC campaign with the Royal Horticultural Society garnered good results and should be used as an example of attracting visitors to BC with gardens as a trip motivator.

Other than a few gardens, BC is not well represented in travel trade or garden interest tours Internationally, or within BC-based travel tours overall.

The Butchart Gardens is actively working with multiple DMOs (CTC, Destination BC, Tourism Vancouver Island, Tourism Victoria, Tourism Vancouver, and Seattle) and participates with consumer, travel trade, media relations, and MCIT markets. As such, it is well represented as a lead garden product in BC.

11. Competitive Review

It was generally agreed by BC garden sector stakeholders that the top competitor for garden tourism within BC is simply other activities, particularly the wide variety of outdoor activities and greenspace (forests, shoreline, grassland, mountains) that can be enjoyed for free. A key challenge to the sector is how to differentiate itself against these other activities (and justify an admission fee for it).

Second to these outdoor activities are other, more "marquee" attractions in BC such as aquariums, zoos, and TELUS World of Science.

However, looking specifically at competitive "garden product", Washington and Oregon states provide the most direct local competition, while Ontario is seen as the closest Canadian competitor for gaining international garden visitors. Each of these is explored in more detail in the section to follow, as well as the UK to provide some international context for a region that has a highly developed garden tourism offering.

Competitive Destinations/Product

Washington	

Product	• A Wikipedia entry lists 21 botanical gardens or arboretums within Washington state. (http://en.wikipedia.org/wiki/List_of_botanical_gardens_and_arboretums_in_Washington_%28state%29)
	• Of gardens in Washington, the ones appearing most frequently in marketing materials and web searches include:
	    ○ Bellevue Botanical Garden
	    ○ Bloedel Reserve
	    ○ Chihuly Garden & Glass
	    ○ Japanese Tea Garden

	◦ Kubota Garden ◦ Ohme Gardens ◦ Rhododendron Species Botanical Garden ◦ Seattle Chinese Garden ◦ Washington Park Arboretum • Seattle hosts the annual Northwest Flower & Garden Show, the largest indoor garden show west of Philadelphia which attracted almost 50,000 visitors in 2014 (attendance was down somewhat due to coinciding with the Seahawks Super Bowl parade). The show features the largest roster of free horticulture seminars of any garden show in the world. Travel specials for Canadian visitors were featured prominently on the show's website. • The Skagit Valley Tulip Festival is another marquee event for garden tourism in Washington. Held in April each year, the festival (now in its 30th year) draws more than a million visitors to the region to view millions of tulips in bloom and take part in a wide variety of related events in the area.
Garden Tourism - Sector Development & Marketing	• With the Washington State tourism office closing in 2011, the Washington Tourism Alliance (WTA) was formed by industry stakeholders to advocate, promote, develop and sustain the state's tourism industry. With bigger issues to address, the WTA has not focused on sector-specific strategies and there appears to be no information available related to garden tourism. • On the Washington State visitor-facing tourism website (www.experiencewa.com), gardens are found under Things to Do, within the category of Natural Beauty. The site lists 17 entries (some of which are repeated) but offer no information about the listings, only a link to a map and the garden website. It has the appearance of being a sponsored list as it is seemingly random and misses some of the state's key garden attractions. • On the Seattle tourism site (www.visitseattle.org) there are no sub-category listings specific to gardens, and a search for garden(s) on the site revealed only a handful of results, including Dale Chihuly Garden & Glass, Bloedel Reserve, Rhododendron Species Botanical Garden, the Northwest Flower & Garden Show and (surprisingly) Butchart Gardens. • In terms of garden sector-driven organizations, there is the Garden Conservancy Northwest Network (www.gardenconservancynorthwestnetwork.org). It is "a member supported non-profit association of Pacific Northwest gardens and horticultural organizations dedicated to preserving historic green spaces, opening exceptional gardens for public enjoyment, and educating people about horticulture". The association lists 22 member gardens, and only one from British Columbia (Milner Gardens in Qualicum Beach). Member gardens are provided a promotional paragraph as well as a link back to their websites, and can list events (though event listing functionality is rudimentary). It also provides a list of non-member gardens in Washington, Oregon and BC (though no links). It does not have the appearance of generating significant awareness/marketing impact.

Oregon	

Product	• A Wikipedia entry lists 21 botanical gardens or arboretums within Oregon. (http://en.wikipedia.org/wiki/List_of_botanical_gardens_and_arboretums_in_Oregon)
	• Of gardens in Oregon, the ones appearing most frequently in marketing materials and web searches include:
	    o **Oregon Garden** – located in Silverton, with an estimated 90,000 annual visitors. Though this garden has been plagued with financial difficulties since opening in 1999, it appears to be resolving some of these issues thanks to state lottery funding, a hotel and conference centre, outdoor weddings and a large list of special events. The garden features 20 specialty gardens including a children's garden, vegetable garden and sensory garden.
	    o **Portland International Rose Test Garden** – located within Washington Park in Portland and featuring more than 550 varieties of roses. Garden visitation is estimated at 250,000 annually.
	    o **Portland Japanese Garden** – also located within Washington Park with estimated annual visitation of 200,000.
	• The Portland Rose Festival is an annual civic festival held in June each year and features the Grand Floral Parade, with an estimated 500,000 people lining the route. While the festival program goes far beyond the reaches of garden-specific activities, it does include the Annual Spring Rose Show, with rose growers from across the Pacific Northwest and up to 6,000 spectators.

Garden Tourism - Sector Development & Marketing	• The Travel Oregon industry-facing website (www.industry.traveloregon.com) does not feature any research or marketing materials related specifically to gardens, but does include tourism strategy documents for agritourism and culinary tourism. • The Travel Oregon visitor-facing website (www.traveloregon.com) lists Flower & Gardens under its Events banner (featuring some current event listings as well as some dated "stories" providing itineraries to gardens, parks and garden-related events). Under the heading of "Attractions", gardens are not listed as their own sub-category and are generally tagged under the broader heading of "Outdoors & Nature". There does not appear to be any section highlighting garden products in particular. • Gardens are featured more prominently on the Travel Portland website, listed as one of the main categories of Activities & Attractions. Featured gardens include the Portland International Rose Test Garden and Portland Japanese Garden (both of which are housed within the larger Washington Park) and Lan Su Chinese Garden. The site then drills down to other featured gardens by district within Portland, with other noteworthy gardens such as Crystal Springs Rhododendron Garden, The Grotto and Leach Botanical Garden. • A web search did not reveal any garden-specific tourism organization within Oregon state other than the aforementioned Garden Conservancy Northwest Network.

Ontario	

Product	• Through work by the Ontario Garden Tourism Coalition, a comprehensive audit of garden experiences and festivals was completed and is available in the Ontario Garden Tourism Strategy document.
	• Some of the most visited and noteworthy gardens or garden experiences in Ontario include:
	    o Royal Botanical Gardens
	    o Niagara Falls Garden Trail
	    o Allan Gardens Conservatory
	    o Toronto Botanical Garden
	    o Shakespearean Gardens
	    o Gardens at Casa Loma
	• Ottawa also hosts the world's largest tulip festival – the Canada Tulip Festival – which draws up to 600,000 visitors annually for three weeks in May.

Garden Tourism - Sector Development & Marketing	• Ontario has one of the more developed garden tourism sectors in Canada. The Ontario Garden Tourism Coalition (OGTC) was developed in 2009 with the goal of developing Ontario's Garden Experience and promoting it as part of Ontario's greater tourism experience (similar to the path taken by the Ontario Culinary Tourism Alliance). • The OGTC accepts members across many segments of the garden industry and the intent of their website is to provide the most comprehensive listing of garden destinations in Ontario. It currently lists gardens and garden festivals (with corresponding links) across 13 regions of Ontario. • The OGTC commissioned the Ontario Garden Tourism Strategy in 2011, and as part of that initiative, workshops were also held in conjunction with Regional Tourism Organizations in three locations to discuss best practices and strategies in garden tourism. • The visitor-facing Ontario tourism site (www.ontariotravel.net) features gardens as a primary category under Things to Do and features further links to pages focusing on the Niagara region, historic homes and gardens, and a more generic listing of other Ontario gardens. • A search of Ontario's industry-facing site (www.tourismpartners.com) for garden-related information revealed only a list of garden story ideas for media relations purposes.

United Kingdom	
Visitation	• The most recent research released by Visit Britain found that of the 31 million visitors to Britain each year, 11.1 million enjoyed a park or garden (36%). Overall, those aged under 35 were particularly likely to visit a park or garden (41% of visits vs. 33% of visits from those aged over 35)[40]. • Top garden tourist markets: France, US, Germany, Spain, Australia • *Garden Tourism* (Benfield) revealed a number of other key findings regarding

[40] Source: Press Release: "Overseas Visitors to Britain's Parks and Gardens Spend £7.8 Billion in UK", Visit Britain, June 2013

	visitors to UK gardens: ◦ Since 1989 garden visiting has become one of the fastest growing sectors of the UK tourism industry. ◦ Top gardens by visitation: Chester Zoo, Royal Botanic Gardens - Kew, Royal Horticultural Society Wisley, Eden Project, Royal Botanic Garden - Edinburgh (Chester Zoo and RBG Kew among top five of ALL UK attractions). ◦ Visitors primarily professional, white-collar groups or retired. ◦ 69% were always interested in gardens and, of the rest, they were an average of 33 years old when they became interested (likely tying in with home ownership). ◦ Majority of visitors to UK gardens (94.8%) were garden owners and were frequent visitors (47% at least once a month and 47% several times a year).
Product	• Though the total number of gardens in the UK appears to be somewhat "uncharted", Benfield's research finds there could be as many as 3,000 private gardens open to the public in the UK. • Gardens that appear frequently in "top" lists, web searches and marketing materials include: ◦ Bodnant Garden ◦ Eden Project ◦ Hidcote Manor Garden ◦ Lost Gardens of Heligan ◦ Sissinghurst Castle Garden ◦ Royal Botanic Garden, Kew ◦ Royal Horticultural Society Wisley • Two garden management organizations of note are the National Trust and the Royal Horticultural Society (RHS). ◦ The National Trust lists almost 150 gardens under their management and their website features a filterable map, iPhone app, featured gardens, garden events, and a variety of other information. National Trust is a "UK conservation charity, protecting historic places and green spaces, and opening them up for ever, for everyone". It is independent of government, with 3.7 million members and 61,000 volunteers. Specific to gardens, it works with 450 gardeners and 3,000 garden volunteers. ◦ The RHS is the UK's leading gardening charity dedicated to advancing horticulture and promoting good gardening. While the RHS oversees the management of just four gardens in the UK, it has also partnered with more than 150 gardens throughout the UK and overseas to offer free entry to RHS members. RHS boasts 360,000 members and sponsors 16 shows across the UK attracting more than 650,000 visitors. RHS gardens attract 1.5 million visitors/year. • The UK also holds one of the world's most renowned indoor flower shows, the Chelsea Flower Show. While the venue limits attendance numbers to 157,000 each year, the show is covered by BBC, attended by members of the Royal Family, and

	receipt of an award is highly coveted for its publicity and political support gains. The show is sponsored by the Royal Horticultural Society.
Garden Tourism - Sector Development & Marketing	• The Visit Britain customer-facing website (www.visitbritain.com) features two sections related to gardens (under Things to Do – Countryside). One page includes a description of five gardens with accompanying website links. • A second page features its top 10 gardens, including Kew Gardens and the Eden Project, providing links to each garden's website. There is also a link to an external site www.greatbritishgardens.co.uk, which appears to have started as a personal interest project but now features links and information to over 500 garden experiences across Great Britain. The site also provides information on a large variety of garden tours marketed by Brightwater Holidays within Great Britain and internationally. The 2014 tour line-up features a tour to California. • Though the impact of their marketing efforts on the international visitor base is unknown, both the National Trust and RHS have a significant presence within the domestic market, if not among their vast membership bases alone. With some of the most visited garden properties and most significant indoor shows in the UK, these two organizations are major contributors to the garden sector in UK, a region with a long history and love for gardens. • The National Gardens Scheme (NGS) also provides strong promotional support for gardens in England and Wales. The NGS is a charitable organization founded in 1927 that publishes the Yellow Book each year, with the most recent edition featuring over 3,700 public gardens made open to the public, with all proceeds going to NGS for charity.

Gardens for Comparison

To follow are some comparison examples of garden tourism sector marketing activities that can provide guidance to BC sector development.

Greater Philadelphia Gardens

Greater Philadelphia Gardens is a collaboration amongst almost 30 gardens in the region, one of the first such organizations to be founded in the United States (in 1989). Its member gardens, arboreta and historic houses attract more than two million visitors per year.

The website (www.greaterphiladelphiagardens.org) features a short description and links to each garden, search functionality to list gardens by type, features, location and amenities, a detailed event listing that appears well-used by its membership, news and articles of interest to gardeners, and a link to press releases from member gardens.

Each spring, member gardens also participate in the World's Largest Garden Party, which features a variety of activities such as plant sales, wildflower walks, garden tours, hands-on workshops, lectures and evening galas.

Ireland Garden Tourism

Similar to the UK, Ireland has a rich history in, and love for, gardens, and this is apparent in the tourism support provided to the garden sector. On the tourist-facing website for Failte Ireland (www.discoverireland.ie), "Gardens of Ireland" are featured in "Things to Do" under the Attractions category. The site provides an extensive listing of gardens, and some garden festivals. Though it does reference garden trails, it surprisingly does not have links to these trails.

However, further research on a popular Irish gardening site (http://www.garden.ie/gardens_to_see.aspx) reveals a link to 19 different garden trails and festivals. Although some links are broken or simply point to the county's general tourism website, several do have specific garden trail maps. Some are sponsored in part by Failte Ireland, while others are not. This website also provides information about Gardens Open, a magazine available at Failte Ireland offices featuring over 300 gardens in Ireland open to the public.

One of the most developed garden trails is the Carlow Garden Trail and features a website (www.carlowgardentrail.com), a downloadable map and brochure, trail road signage and information boards available at each of the 16 participating gardens.

The Northern Ireland Tourist Board (NITB) features the garden sector as one of seven key focus areas in terms of culture, heritage and activities tourism. Their research has shown that 52% of all visitors to Northern Ireland go to a park or garden.

An example of their support is the development of the Antrim Garden Trail, a website and pamphlet with a self-guided tour of gardens within that county. The tourist-facing website for Northern Ireland (www.discovernorthernireland.com) also prominently features gardens as a primary attraction within the region, offering information about many garden attractions, festivals, itineraries, daytrips, etc.

Key Insights

Research into strategies by competitive markets as well as best in class examples reveal an opportunity for BC to create a real presence in garden tourism sector marketing in the Pacific Northwest. While both Washington and Portland have significant garden products, neither state appears to have a coordinated approach to marketing these products as a whole. Portland, with a wide variety of well-known garden experiences within its city limits, has done the best job of promoting gardens as a key element of the city's tourist offering.

While provinces such as Ontario have a more developed garden tourism strategy, it can be argued that it is still in its development phase, and it is uncertain the impact it is presently having from a consumer marketing perspective. The Ontario Garden Tourism website, while comprehensive in its listing of gardens, is currently somewhat static compared to the more dynamic (though of course long-established) Greater Philadelphia Gardens (GPG) site.

With the GPG site as a model, a strong consumer-oriented web presence would set BC apart from its Pacific Northwest counterparts. Gardens BC could also take cues from Ireland in exploring garden trail map development (on a regional basis).

12. SWOT

Strengths

- Sector has begun to organize and evolve as a collective group.
- BC has a diversity of garden tourism experiences.
- BC has globally unique growing Zones (climate zones) – the combination of modified Mediterranean and high desert chaparral.
- Gardens cater to an affluent and mature demographic (a growing one).
- Gardens cater to wide variety of cultural and ethnic tastes.
- Gardens are supported at a local level by both governments and volunteers.
- Gardens are represented in most destination marketing general promotional and touring activities.
- The Butchart Gardens and Butterfly Gardens participate in overseas marketing and provide tourism marketing leadership.

Weaknesses

- Many BC garden operations are small and seasonal.
- Low volume of gardens in northern BC.
- Younger generation less inclined to visit gardens.
- Gardens perceived as boring, and not time-sensitive (by travellers and industry).
- Limited marketing infrastructure or initiatives for BC garden tourism sector as a whole, including lack of well-maintained website and digital strategy.
- Finding skilled labour can be challenging.
- Lack of BC-based garden tourism research to inform business decisions.

Opportunities

- Positive indicators for future tourism growth in BC.
- Positive indicators for future growth in garden tourism globally.
- Overall aging of population.
- Asian audiences seeing Canadian great outdoors.
- Trend toward foods gardens and other green practices and initiatives help support overall environmental sustainability.
- Trend towards urbanization creates new markets for visiting green spaces.

Threats

- Increase in “free” garden and outdoor attractions to compete with paid attractions.

- Decline and change in volunteer sector due to aging volunteers.
- Government funding as an important financial support mechanism for many gardens.
- Younger generation less inclined to participate in outdoor activities.
- Destination BC programs may shift with the evolution of the new Crown Corporation.
- Geographic dispersal of gardens in BC.
- Greater competition overall for donations and endowments may limit funding to gardens.
- Land value – too expensive vs opportunity costs for other development.
- Housing market.
- Climate change.
- Transportation and access cost and services may hinder ability to travel to and around BC.

13. Implications of the Situation Analysis

There are positive signals for growth that demonstrate BC could create a real presence in garden tourism sector marketing in the Pacific Northwest and Internationally. Significant steps have been taken to organize and develop the garden tourism sector to date and there opportunities exist to demonstrate the sector has growth potential in the future.

Further information is needed to better understand the BC garden tourism sector as well as consumer behaviour and perceptions of the BC garden tourism product. Currently, information specific to BC is limited to old studies (TAMS) or new information specific to the COM study for botanical gardens, which is not specifically tourism focused.

A definition for garden tourism in BC is required. This will ensure marketing efforts are focused on the garden tourism operators that will deliver growth for the sector.

There are opportunities to engage new audiences (local and near-in markets) in the garden tourism experience. In particular, education programs appear to appeal to a wide audience, specifically the desire to learn more about nature conservation, growing food, having a home garden, and other nature-related topics. New attractions and events have shown to be a great way to increase awareness, create trial, create new users, and increase visitation to gardens globally. The BC garden tourism sector will need to create new advocates by ensuring it features events and educational offerings that are evolving to meet new needs and interests.

The garden tourism sector can explore a number of different complementary activities to create the authentic, cultural experience their existing target market is seeking. Garden visitors are shown to be very active in their travel habits and participate in a wider variety of cultural, entertainment and outdoor activities than the average traveller.

An increase in marketing efforts is required to better promote the BC garden tourism experience. Efforts are required to create interest and urgency in visiting gardens. Potential activities could include development of Gardens BC website, development of digital strategy, increase presence in travel trade itineraries, development of packaged offers, increase the promotion of on-site activities and attractions, and increase in events.

Key messaging needs to be developed that balances the interests and attitudes of current and potential markets. Messaging could include: environmental concerns, the appeal of nature (in an increasingly urban world), relaxation/rejuvenation/tranquility, attractions/activities/events within gardens, complementary activities, and shoulder season offerings.

Partnerships may be a key strategy for growth. Gardens are seen as supporting tourism products for many of BC's tourism industry, including touring, wineries, arts and culture, museums and heritage sites, and agritourism. Also, there are significant and passionate garden partners that could be leveraged for the garden tourism sector in BC.

14. Future Garden Tourism sector and Destination BC Research Opportunities

There is currently a gap in understanding the size of the garden tourism sector in BC, sector performance or economic benefits. Also, there are not clearly defined objectives or benchmarks to measure against.

A review of the available research on garden visitor characteristics reveals a need for more information about BC-specific travel motivations for visiting all gardens, how this differs among various demographic/lifestyle groups, and barriers among those who do not visit gardens while travelling. This will help the sector reinforce the drivers that are working, and uncover new drivers that will be necessary to move beyond the existing visitor base.

It was identified during Planning Meeting #1 that while there is existing information and research on the garden tourism visitor, this information should be compiled and synthesized to develop a usable profile, including psychographics and "spendographics". Available resources include TAMS, Global Tourism Watch, EQ, Cultivating Our Market Project (COMP), BC Museum Association Research.

There are currently gaps in understanding who the best partners are likely to be. There are case studies that already exist on partner models that work that should be explored.

15. Appendix

Appendix 1: January 24, 2014 Planning Meeting - Meeting Participants

The January 24, 2014 meeting was attended by 20 people, including Richard Lewis, Karen Homes, and Nancy Radman, representatives from Destination BC. Susan Rybar facilitated the workshop on behalf of Destination BC.

The garden tourism stakeholder participants were:

Participant	Organization
Geoff Ball	Milner Gardens
Graham Bell	Butchart Gardens
Roger Charles	Horticulture Centre of the Pacific
Dave Cowen	Butchart Gardens
Michel Gauthier	Canadian Garden Tourism Council
Kathy Gibler	Dr. Sun Yat-Sen Classical Chinese Garden
Catherine Kennedy	Communites in Bloom
Patrick Lewis	UBC Botanical Garden
Richard Los	Butchart Gardens
Erin Minter	Minter Gardens
Paul Nursey	Tourism Victoria
Suzanne Raikes	Tourism Vancouver
David Roberts	Victoria Butterfly Gardens
Dale Ryan	Butchart Gardens
Terry Slattery	Grad student working with Butchart Gardens
Dr. Brian White	Royal Roads University
Bruce Whyte	Tourism Policy Branch, Ministry of Jobs, Tourism and Skills Training

Destination British Columbia

Appendix 2: TAMS US and Canadian pleasure travellers to BC

	US Pleasure Travellers to BC 7,025,878	CDN Pleasure Travellers to BC 5,651,177
Number - Visited Garden Attraction		
Garden theme attractions (all activities)	-	-
Visited botanical garden	2,314,164	1,171,370
Visited garden theme park	716,085	484,263
Visited both	-	-
% - Visited Garden Attraction		
Garden theme attractions (all activities)	-	-
Visited botanical garden	32.9%	20.7%
Visited garden theme park	10.2%	8.6%
Visited both	-	-
Number - Garden is Main Reason for Trip		
Garden theme attractions (all activities)	-	-
Visited botanical garden	498,336	176,392
Visited garden theme park	180,678	67,380
Visited both	-	-
% of Total Travellers - Main Reason for Trip		
Garden theme attractions (all activities)	-	-
Visited botanical garden	7.1%	3.1%
Visited garden theme park	2.6%	1.2%
Visited both	-	-
% of Garden Visitors - Main Reason for Trip		
Garden theme attractions (all activities)	-	-
Visited botanical garden	21.5%	15.1%
Visited garden theme park	25.2%	13.9%
Visited both	-	-

Source: Destination BC-provided TAMS data file