Final Report

Market Analysis for Horticultural Tourism in Ontario

Prepared for:

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Executive Summary

The overall gardening market is composed of two broad market segments—the expert and serious gardeners and the everyday gardener and casual admirer. Each market segment is likely to seek different experiences and can be reached through different marketing channels. We propose that expert and serious gardeners may he more likely to travel to a destination primarily to experience gardens and gardening, whereas the market characterized by the casual admirer will likely travel to a destination to be outdoors, explore new places, and be around beautiful things.

Butchart Gardens receives an annual visitation of 1.2 million visitors, and both Canada Blooms and the Philadelphia Flower Show draws 45% of visitation from outside the local area. While horticultural tourism may not be a primary motivator for everyday gardeners and casual admirers it seems that gardens and gardening may he at least an integral part of the tourist experience.

The Travel Activity and Motivation Survey that sur eyed both Canadian and American travelers indicates that of the travelers that have traveled or intend to travel to Ontario, 12.1 million Canadians and 29.5 million Americans are likely to be interested in garden attractions at least to some extent. Of these travelers, garden attractions impact their interest in Ontario "a lot" for 4.38 million Canadian and 10.4 million American travelers. Demand for garden attractions will likely intensify over the next two years, particularly from the American market.

Ontario is home to a number of unique and exciting gardens and garden-related product. Four events—Canada Blooms, Tulip Festival, Lilac Festival and Blossom Festival—positions Ontario as a leading destination for gardens and gardening. From a supply perspective, the Ontario tourist areas that demonstrated the most potential development opportunities are:

Niagara – Hamilton - has sufficient product and infrastructure that will appeal to both the serious gardener and the casual admirer.

Eastern Ontario - has significant and high profile events (e.g. Tulip Festival) and product (e.g. Upper Canada Village) but will likely require further investment in complementary attractions and product.

- Greater Toronto Area - offers a range of horticultural related attractions (e.g. Allen Gardens, Edwards Gardens, Metro 'Loo, Casa Loma, Cullen Gardens), high profile events (e.g. Canada Blooms), and support serviceslamenities (e.g. specialty retail) but has not been positioned as a horticultural destination.

Outside of these three areas, the attractions fitting within a horticultural tourism theme may be limited.

KPMG, believes that sufficient interest exists in gardens and gardening as an integral part of the tourist experience and sufficient product is available (particularly in Niagara-Hamilton area), to warrant further research into horticultural tourism,

The next step to be taken is to begin the analysis of the high-priority tourist regions using the matrix developed. Niagara-Hamilton would be a logical tourist area to begun the process and then roll-out to Easteni Ontario and so on as demand arises.

Each Ontario tourist region offers a unique mix of horticultural products and complementary attractions and services. As a result, careful consideration must be given to the potential for developing horticultural tourism (e.g. to a limited or a significant extent) to position the region's "must see" appeal firmly in the mind of the consumer. While gardens and gardening may not prove to be the primary motivator to travel to a region, regions such as Niagara-Hamilton may prove to offer sufficient product and interest to leverage existing resources and tap into an emerging market potential.

I Introduction

KPMG was retained by the Ministry of Tourism to develop a high-level market analysis of the potential for horticultural tourism in Ontario.

A, Background

Gardening is a popular leisure activity in North America. According to Landscape Ontario, the popularity of gardening will grow approximately 52% over the next 10 years driven by the influence of baby boomers transitioning into their prime home owning years. There are also some indications that horticulture and gardening is a growing interest for tourists. For example:

- Canada Blooms receives 100,000 - 117,000 visitors. The organizers report that the event draws 55% of its visitors from Toronto and area and draws 20% of its visitors from Southern Ontario. Further, Canada Blooms draws from outside the province and internationally as well (in 2001, Canada Blooms hosted 19 bus tours from Quebec., New York State, Pennsylvania, and Ohio). The strength of demand is remarkable given that it is still a relatively young event with a minimal advertising budget and relies extensively on volunteers, horticultural societies and garden clubs.
- Tourism Quebec launched a tour featuring select Gardens of Quebec.
- Niagara Parks Commission has launched the Blossom Festival targeted at the horticultural market.
- Twenty of Ontario's horticultural attractions formed a Garden Committee in 1999 and have produced a pamphlet showcasing their Gardens and Arboreta in order to promote visitation to their attractions.
- The first International Competition of floral sculptures, Mosaicultures, was held in Montreal June 19-September 30, 2000. This event attracted approximately 500,000 visitors and showcased approximately 125 international exhibits.
- The Lilac Festival at Royal Botanical Garden and the Tulip Festival in Ottawa were named in the American Bus Association's list of the top one hundred events in North America.

- The Canadian Tourism Commission has recently formed the Garden Bloom Tours of Canada Product Club whose mandate is to bring to market-ready status tours across Canada under the gardening, botany and horticulture theme. The Product Club is headed by *Communities in Bloom* in cooperation with Tour Chanteclerc, the Niagara Parks Commission Horticultural School and Royal Botanical Gardens.

B. Objectives and Scope

The objective of the study was to develop a high-level analysis of the feasibility of developing horticultural tourism destinations in Ontario. Specifically, we:

- Reviewed background studies and literature (See Appendix A)
- Interviewed key stakeholders (See Appendix B).
- Conducted three horticultural tourist destination interviews.
- Analyzed the Travel Activity Motivation Survey data for strength of interest in horticultural tourist product.
- Developed a working definition of horticultural tourism.
- Assessed the Ontario marketplace to identify potential opportunities.
- Determined preliminary criteria to assess the potential for further development.
- Identified next steps, potential opportunities and key players.

Much of our analysis was based upon a review of available research and stakeholder interviews. This report should be viewed as preliminary and will require further research and analysis to confirm the validity of the findings. We have employed information and data provided by various stakeholders. It was beyond the scope of this study to independently verify information provided to us.

Given the upswell of interest in gardening and horticulture, and given that there is an increasing amount of horticultural tourist product coming on stream, it seems timely to investigate whether horticulture can be a primary motivator to travel.

This report presents the results of the study and provides recommendations for next steps.

II. What is Horticultural Tourism?

In this chapter we present an overview of horticultural tourism, gardening (specifically who and why people garden) and garden attractions in order to help develop an understanding of the potential for developing a horticultural tourist product in the Ontario marketplace.

A. Working Definition of Horticultural Tourism

We propose the following working definition:

Horticultural tourism can he narrowly defined as travel primarily motivated by gardens and/or gardening. It can be more broadly defined to include travel where gardens are a critical component of *the overall experience but not the primary motivator.*

B. Horticulture and Travel

The recently completed Travel Activity and Motivation Survey (TAMS) sponsored by the Ontario Ministry of Tourism, Culture and Recreation along with 13 other partners across Canada, provides us with a good estimation of the size and characteristics of the market interested in horticultural tourism. The survey asked Canadian and U.S. travelers if they visited a garden or botanical attraction while on a pleasure trip and to what extent garden attractions impacted on their decision to travel to Ontario.

Conducted across Canada and the United States between September 27, 1999 and April 16, 2000, the TAMS' methodology consisted of a telephone interview and a self-completed mail-back questionnaire. The data was weighted and projected to national levels for both Canada and the United States and is estimated to be representative of an estimated 19.6 million adult Canadian travelers and 171.28 million adult American travelers.

Estimated Size of Total Horticultural Tourism Market

As demonstrated in Exhibit II-1 , approximately 48.1% and 52.3% of Canadian and American travelers respectively have participated in a horticultural-related activity on a pleasure trip at some time. Approximately 7.25 million Canadians and 65.13 million Americans have participated in horticultural activities on trips within the last two years, and 6.9 million Canadians and 72.1 million Americans will likely participate over the next two years.

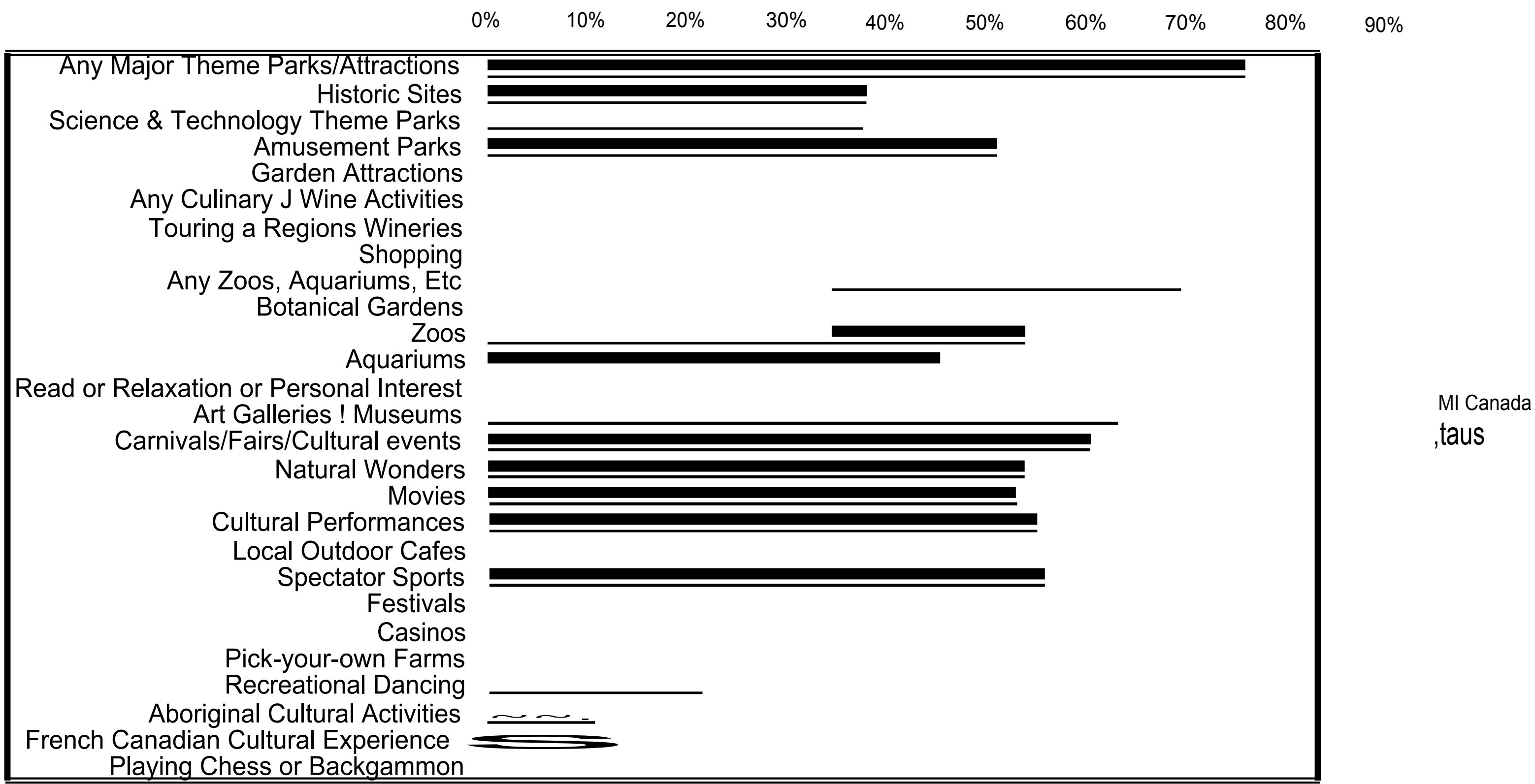
Exhibit II-1
Any Horticultural Activities on Trips (Weighted, `000s)

	At any Time	% r f total	In Past 2 Years	% of t~~tal	In Next 2 Years	Ra'cif tota
Canada	9,444	48.2%	7,250	37.0%	6,880	35.1%
United States	89,539	523%	65,135	38. 0%	'72,054	4' 1%

Source: 7.4MS-Horticulture

flow often do Canadian and American travelers seek out garden or botanical attractions? Of the total travelers, approximately 25% of Canadian and American travelers seek out garden attractions and 30% seek out botanical gardens. Visiting amusements parks/attractions, shopping and dining are the most popular activities, however (rated 76%, 82%, 83% respectively). The data also suggests that American travelers seem to have a higher propensity for seeking out horticultural activities while on a trip.

Exhibit 11-2
Cultural and Shopping Experiences on a Trip, Total Canadian and US Travelers (weighted, 000s)



TAMS-Horticulture

Potential Interest in Ontario's Horticultural Tourism Product

The TAMS survey suggests that of the total travelers, 10.2 million Canadian and 48.7 million Americans have traveled or intend to travel to Ontario for pleasure purposes.

As Exhibit I1-3 demonstrates, of those travelers that have or intend to travel to Ontario, garden attractions impact their interest in Ontario "a lot" for 4.38 million (24.1%) Canadian travelers and 10.4 million (21.4%) American travelers. Another 7.68 million (40.0%) and 19.07 million (39.1%) Canadian and American travelers respectively are a little influenced by garden attractions. Therefore, the TAMS survey indicates that garden attractions impacts the decision to travel to Ontario for approximately 12.1 million Canadian and 29.5 million American travelers at least to some extent.

Exhibit 11-3
Stated Impact of Garden Attractions on Interest in Ontario by Ontario Pleasure Travelers (Weighted, `000s)

	None	of total	A Little	'0 of total	A Lot	%of total
Canada	6,829	33.0N	7,684	40.0%	4,381	24.1%
United States	15,728	32.3%	19,075	39;1%	10,439	21.4

Source: 714!1S-Horticulture

Not surprisingly, the impact of garden attractions on their interest in Ontario is more intense amongst those travelers that have an interest in gardens (see Exhibit II-4).

Exhibit 11-4
Stated Impact of Garden Attractions on Interest in Ontario by Ontario Pleasure Travelers that are Interested in Gardens

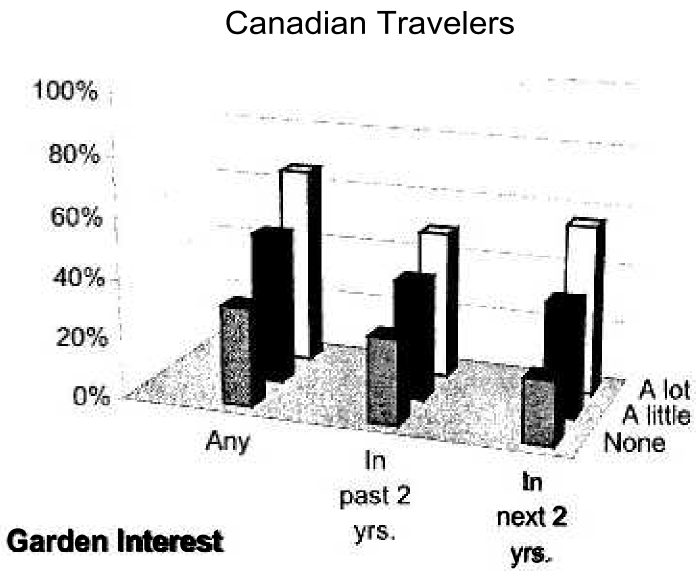
(Weighted, `000s)

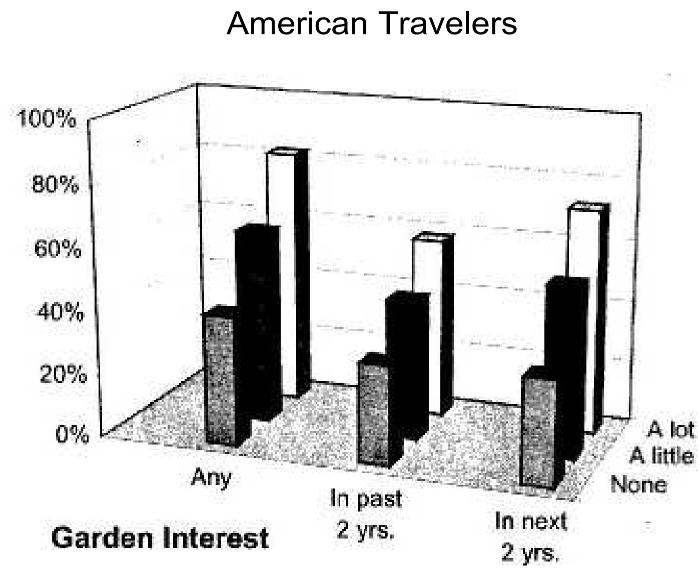
	None	% of total	A Little	% of total	A Lot	% of total
Canada	1,095	32.6%	2,041	50.1%	1,625	66.1%
United States	6,499	41 3%	11,828	b2 O%	8,576	82.1%

Source: TAMS-Horticulture

As Exhibit H-5 indicates, interest in garden attractions in Ontario will likely intensify over the next two years.

Exhibit 11-5
Impact of Garden Attractions on Interest in Ontario by Pleasure Travelers that are Interested in Gardens (Weighted, `000s)





Source: TAMS-Horticulture

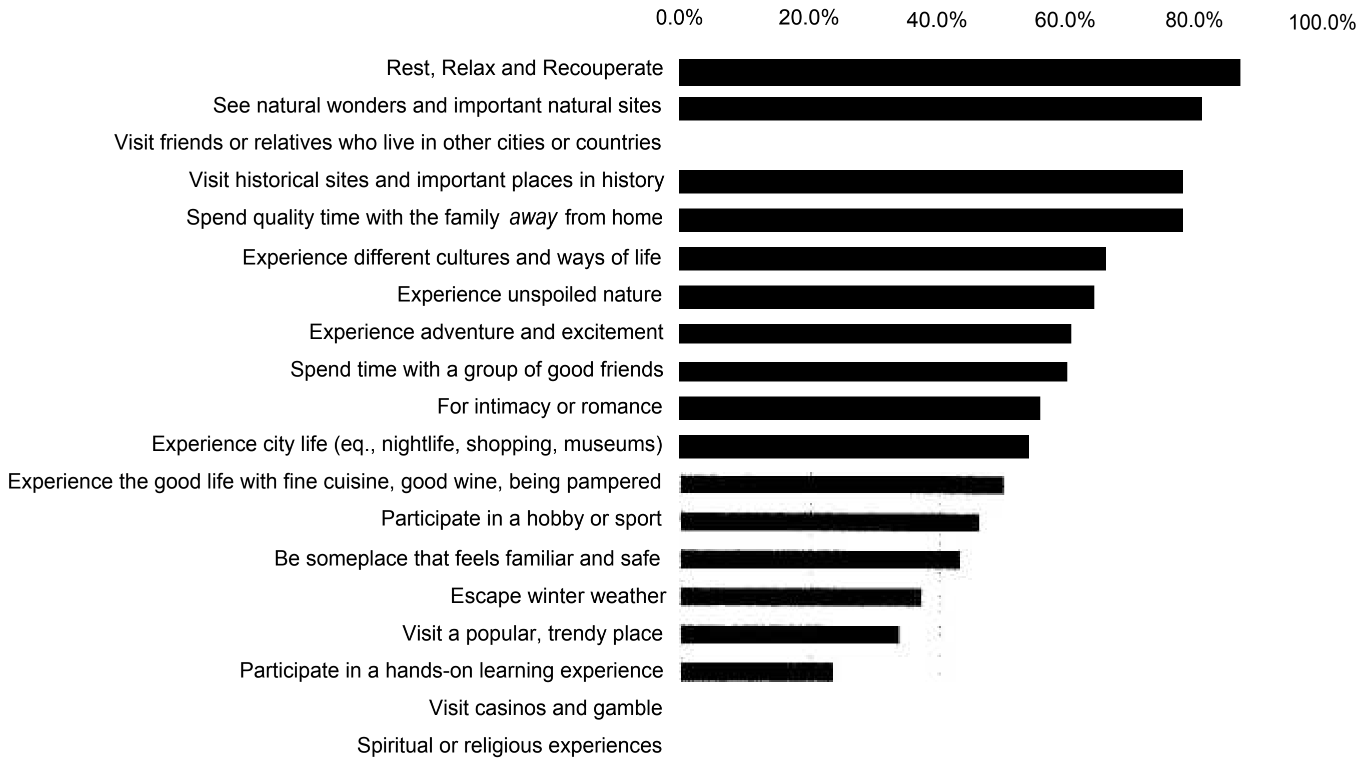
Experiences Sought by Travelers That Visit Garden Attractions

What travel experiences do travelers that visit garden attractions seek? As Exhibit II-6 demonstrates, travelers that visit garden attractions are most likely to be interested in rest and relaxation, but they are also interested in seeing natural wonders and spending quality time with their family and friends. Travelers that visit garden attractions are least likely to want to visit a popular or trendy place, visit a casino, or participate in a spiritual or learning experience.

The TAMS survey also asked what shopping or cultural experiences were sought by travelers. As demonstrated in Exhibit II-7, travelers that visit garden attractions are most likely to seek out shopping, culinary/wine activities, zoos and aquariums, art galleries and museums and reading and relaxation. They are least likely to seek out casinos, participate in specific (i.e., aboriginal and French Canadian) culture, and pick-your-own-farms. Surprisingly seeking out festivals rated relatively low, however carnivals /fairs/cultural events were rated very highly.

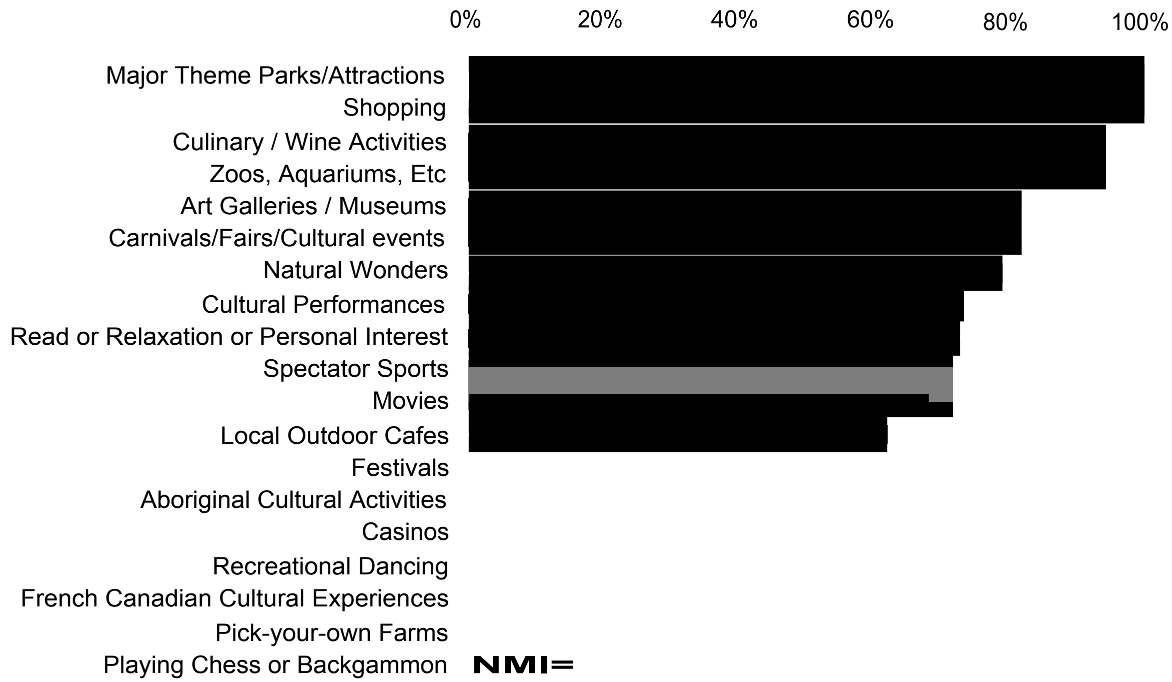
There are minor differences between Canadian and American travelers. We have used U.S data in the exhibits. however both Canadian and U.S. data is shown in Appendix C.

Exhibit 11-6
Travel Experiences Sought by U.S. Travelers that Visit Garden Attractions



Source: TAMS-Horticulture

Exhibit
Cultural and Shopping Experiences Sought by U.S. Travelers that Visit Garden Attractions

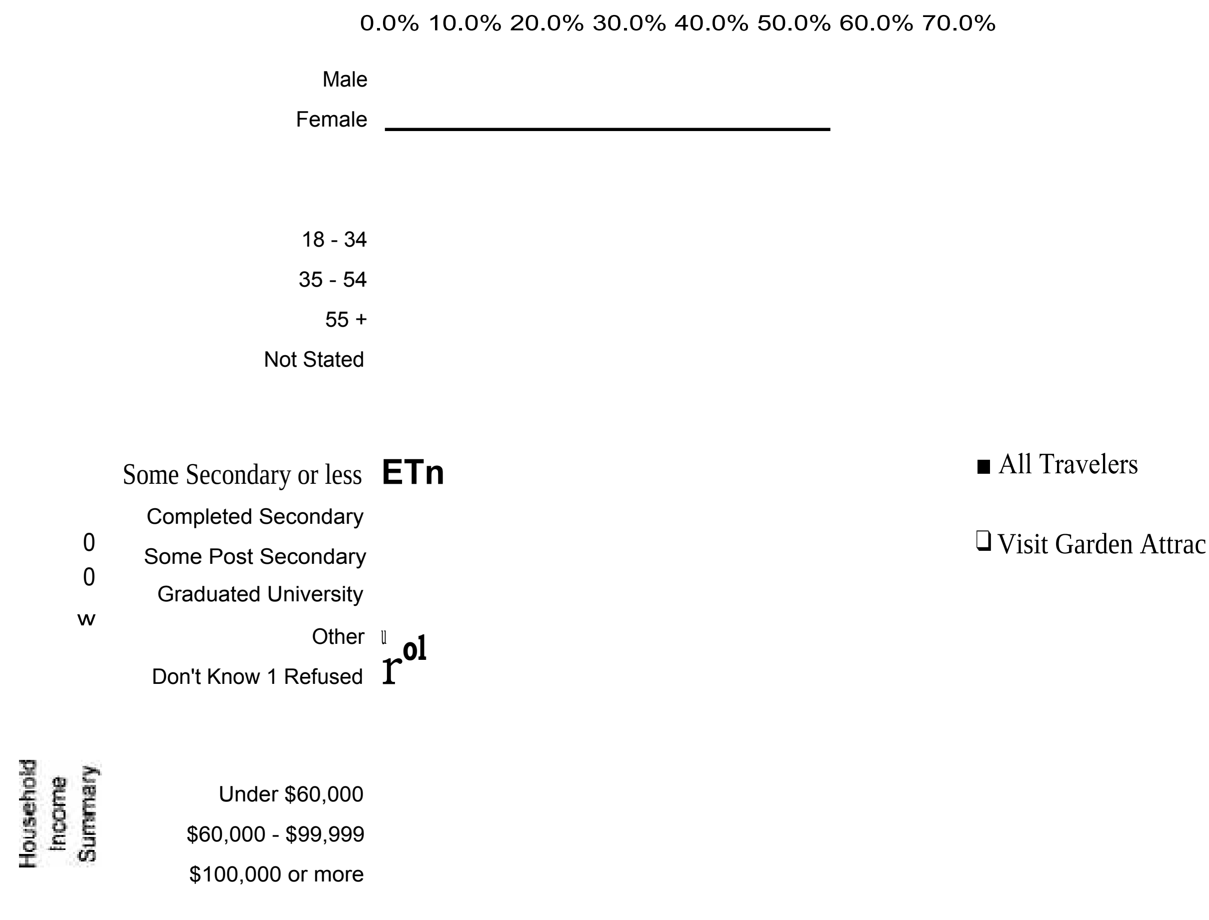


Source; TAMS-Horficu1ture

Demographic Characteristics

Interestingly, and as Exhibit II-8 demonstrates, TAMS indicates that people who participate in garden activities while on vacation are most likely to be female, are university or college educated, work in a professional or managerial capacity, enjoy a slightly higher household income, and are somewhat older. As we shall see, the demographic profile of people who are interested in horticultural tourism closely fits the consumer profile of gardeners.

Exhibit 11-8
Demographic Profile of Travelers that Visit Garden Attractions



Source, TAMS-Horticulture, U.S. Travelers

C. The Gardening Phenomena

Over the past several years, interest in gardening has undergone phenomenal growth both locally and across North America. The annual *National Gardening Survey* conducted by the Gallup Organization for the US-based National Gardening Association reported that US retail sales for lawn and garden products increased 13% to a record $30.2 billion in 1998/99 from $22 billion in 1995.

No similar gardening survey is done for the Canadian market, but Landscape Ontario, believes that the Canadian market is likely to approximate the US market and has undergone similar expansion. Landscape Ontario estimates that gardening, in all its multi-faceted forms, has doubled in the last ten years and is a $4.3 billion industry in Canada.

Horticultural industry growth in Canada is evidenced by the fact that the value of ornamental and plant sales rose 24% in Ontario between 1996 and 1998, from $377 million to $467 million (see Exhibit I1-9). In Canada as a whole, the value of ornamental and plant sales rose 19% to $904 million.

Exhibit 11-9
Value of Ornamental and Plant Sales, Ontario & Canada,
1996-1998 ($000s)

	1996	1997	1998
Ontario	376,965	412,602	467,266
Canada	761.686	834,052	903,787

Source: Statistics Canada. Catalogue No. 2 2-202, as reported on UMi9FRA 13ebsite

D. Why do people garden?

In reviewing the gardening literature there is a sense that the whole image of gardening is changing. Younger, newer gardeners have a different interest in gardening and different buying patterns from the more traditional seniors market. Younger people with stressful jobs may not only be trying to get back to nature through gardening, they may also be becoming more aware of the garden as an extension of the interior design of the house. Gardening novices want to create a lifestyle out of their garden as quickly as possible. To meet this need, the gardening industry is going "upmarket" by putting more emphasis on design—pots, furniture, and landscaping—and by offering supporting educational programming.

People garden to relax, be outdoors and be around beautiful things as shown in Exhibit 11-10. These reasons are consistent with the motivators that might prompt participation in horticultural tourism.

Exhibit 11-10
Why people garden

	of Respondents
Be outdoors	44%
Be around beautiful things	42%
Relax and escape the pressures of everyday life	39%
Stay active and get exercise	35%
Produce food for themselves and their families	18%
Produce fresh supplies of flowers for their homes	14%
Spend time with their families	14%

Source: Roper Starch 1998 Survey. *Multiple responses permitted.*

E. Who gardens?

People who are interested in gardening tend to be well educated, enjoy a relatively high income and are married with children. Yet, gardening has strong participation rates across a number of sectors. The core gardening market can range from younger people buying their first home to the elderly and retired.

In 1998, 65% of all US households (or 67 million households) participated in one or more types of indoor and outdoor lawn and garden activity. According to the U.S. based National Gardening Association, the demographic groups rating highest on the lawn and garden participation index in 1998 were:

- women
- people 30 years of age and older
- university and college educated households
- with professional or business occupations
- married
- small town and rural residents
- households with annual incomes over 540,000

The demographic group least likely to garden is 18-29 year olds and the most likely to garden is aged 60 and over. Nonetheless, the industry is targeting a younger audience than has traditionally been interested in gardening.

Canadian gardeners are likely to be of a similar profile and demographic background as those in the US. As Exhibit 114 1 indicates, the statistics gathered by the National Gardening Association closely mirror the profile of a typical visitor at Canada Blooms.

Exhibit II-11
Profile of Visitors at Canada Blooms

Female	60	Own their home	82
Male	40	Household income	
Married	68	75,000+	24
Age		50,000+	49
25-34	21	Households with children	45
35-49	37		
50-64	24		

Source: Landscape Ontario. Canada Blooms

F. Types of Gardeners

Within the gardening market there may be several levels of interest or experience with gardens and gardening:

- Expert Gardener -- Extremely skilled and knowledgeable gardeners who are highly dedicated to the art and science of gardening and horticulture.
- Serious Gardener - Accomplished gardeners who are very interested in learning about and implementing gardening technique.
- Everyday Gardener - Gardeners who are interested in making their home look attractive.
- Casual Admirer - Non-gardeners who appreciate gardens for the beauty and ambiance, but do not participate in gardening in a meaningful way.

Individuals will fall somewhere along the continuum between Expert Gardener and Casual Admirer. Further, expert and serious gardeners are likely to seek different experiences in a horticultural related activity from the everyday gardener and casual admirer. Analysis must be conducted to confirm types of gardeners and to better understand their expectations of a horticultural tourism product.

G. Types of Horticultural Attractions

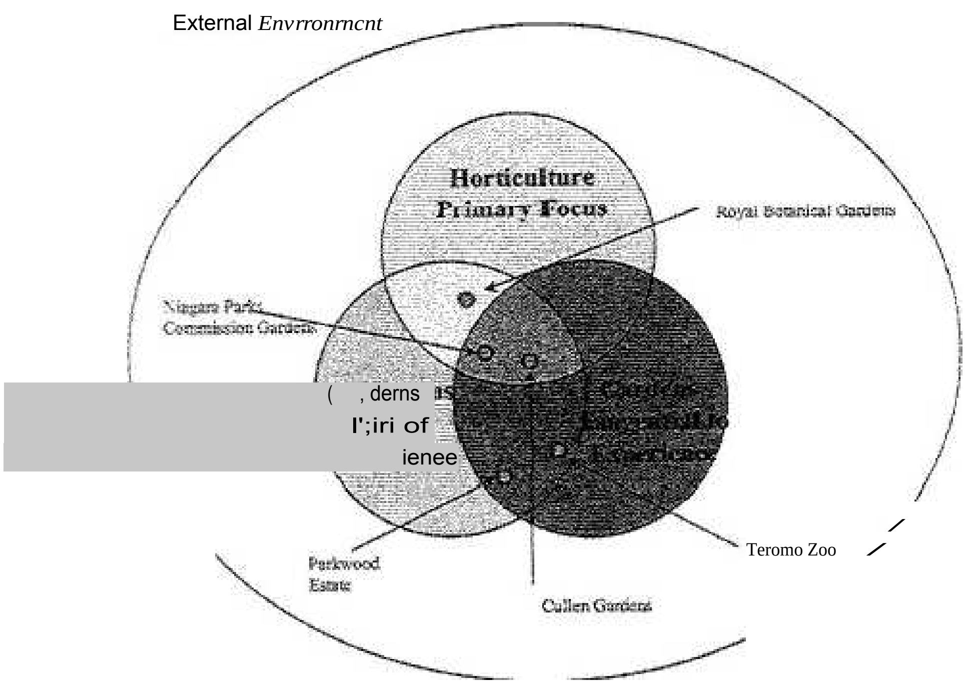
Ontario has a large number of attractions that are either directly related to gardens and horticulture or provide gardens as part of the experience. Given the wide breadth of attractions Ontario offers, it may be useful to differentiate the attractions using the following categorizations:

- Gardens and/or gardening are the ***primary*** focus of the experience.
- Gardens and/or gardening are an ***integral*** component of the overall experience.
- Gardens are ***tangential*** to the primary focus of the experience.

These categorizations are not mutually exclusive. Indeed it may be difficult to categorize some of the larger attractions within one category because visitors will go to the attraction for a different experience. For example, a visitor may go to the Niagara Parks Commission gardens as a significant part of their visit to Niagara Falls, but another visitor may go to these same gardens for their horticultural significance.

As Exhibit 11 demonstratzs, it may be useLl to visualize these categorizations as three overlapping circles and supported by a Host of complementary and related products. We have plotted some of Ontarios destination attractions on the exhibit as examples only,

Exhibit -12
Categories of Horticu ·rai Product



Source: K?/ νJO; Named gardens and a::rdetlein ·' d.,'usIrauorz

Attractions that are able to combine two or three levels of experience may appeal to a wider target audience. It will be important in *subsequent studies to not* only further define the list of attractions but also define the experience the =action is offering..

Within this broad definition various niche products and attractions will appeal to tne our market segments (expert gardeners, serious gardeners% everyday gardens and casual admirers) to varying degrees Exhibit provides a sample of the likelihood of Narious horticultural tourism products to appeal to the various market segments.

Exhibit Ei-
L level of interest

	Expert gardener	Serious gardener	Everyday gardener	Casual admirer
Botanical gardens and arboretum	*****	4***	***	**
Specialty garden tears	*****		***	
Niche retail oetlets r,e.g,. en-loom seeds herbs and herbal gardening. garden accessories)	*****	****		*
Learning gardening vacation	*****	****		
Gardening show or festivals	*****	****.,		****

Numb· of stars d(rnot . anticipated level of interest Sonrce: *KPMG*

Gardens can he developed as an integal component of a related or complementary tourism product or attraction. For example, gardens with flowering plants and ornamental shrubs can be used to extend the length of stay by expandi the visitors experience in any of the following related tourism products:

Food and wine tours

Garden accessories outlets

Cultural and ethnic tours

Aboriginal gardens an tourism sites

Art gallery and studio tours

Ecotourism

Historical Homes and buildings tours

Further research should be conducted into the linkages and co-marketing opportunities that these complementary themes will bring to strengthening Ontario's horticultural tourism product.

H. Conclusion

In this study we have defined horticultural tourism as tourism that is either primarily motivated by gardens and/or gardening or where gardens are a critical component of the overall tourist experience but not the primary motivator. This definition recognizes that the overall horticultural tourism market is composed of at least two market segments. As a result, we have segmented the market into expert and serious gardener and the everyday gardener and/or casual admirer. Individuals in the various market segments are likely to seek different experiences and we propose that expert and serious gardeners are likely to travel to a destination primarily for the gardens and or gardening product, while everyday gardeners and casual admirers will likely view gardens as a critical component of the experience, but not the primary motivator for travel.

We assume the expert and serious gardener segments make up a smaller portion of the overall market as compared to the everyday and casual admirer segment. TAMS suggests that approximately 25-30% of Canadian and American travelers in Canada visit garden attractions and botanical gardens, and that 12.1 million Canadian and 29.5 million American travelers are likely to be interested in garden attractions in Ontario at least to some extent. A smaller portion, or 4.38 million Canadian and 10.4 million American travelers, are likely to he very interested in garden attractions in Ontario.

With the growth of interest evidenced in the consumer marketplace and growth in visitation toevents such as Canada Blooms interest in horticultural tourism is likely to increase. Indeed the TAMS data suggests that interest in Ontario's garden attractions will probably intensify over the next two years.

The horticultural attractions themselves can be differentiated by whether the garden and or gardening is primary, integral or tangential to the experience. Attractions that are able to combine two or three levels of the experience will appeal to a wider audience. Niche products and attractions will appeal to the two market segments (expert and serious gardener, and everyday gardener and casual admirer) to varying degrees and will require careful marketing and communications support. As well there are a variety of complementary and related tourism products that can be logically linked to the horticultural market to extend and round out the horticultural experience.

People who are interested in gardens and gardening represent a broad demographic segment stretchingfrom younger people buying their first home to the elderly and retired. Interestingly, people garden to relax, be outdoors and be around beautiful things. These are consistent with the broad reasons that people might participate in horticultural tourism as well as a variety of other tourism product such as eco-tourism or cultural tourism. While gardens and gardening may not necessarily be a primary motivator for travel for a wide market audience, it can arguably make up an integral component of the overall travel experience.

III. Case Studies

The case studies undertaken for this report have focused on selected areas that contain various horticultural attractions and have had marketing efforts directed towards horticultural tourism. We have used this approach because the Royal Botanical Gardens and the Niagara Parks Commission have undertaken benchmark studies that provide a good deal of information about North American horticultural attractions. More important. is the strength that horticultural attractions have in drawing visitation to a region and the importance these attractions are given in the regional tourism strategy.

Therefore we have chosen to study three regions: Quebec, Victoria, B.C., and Pennsylvania. These regions were chosen for the following reasons:

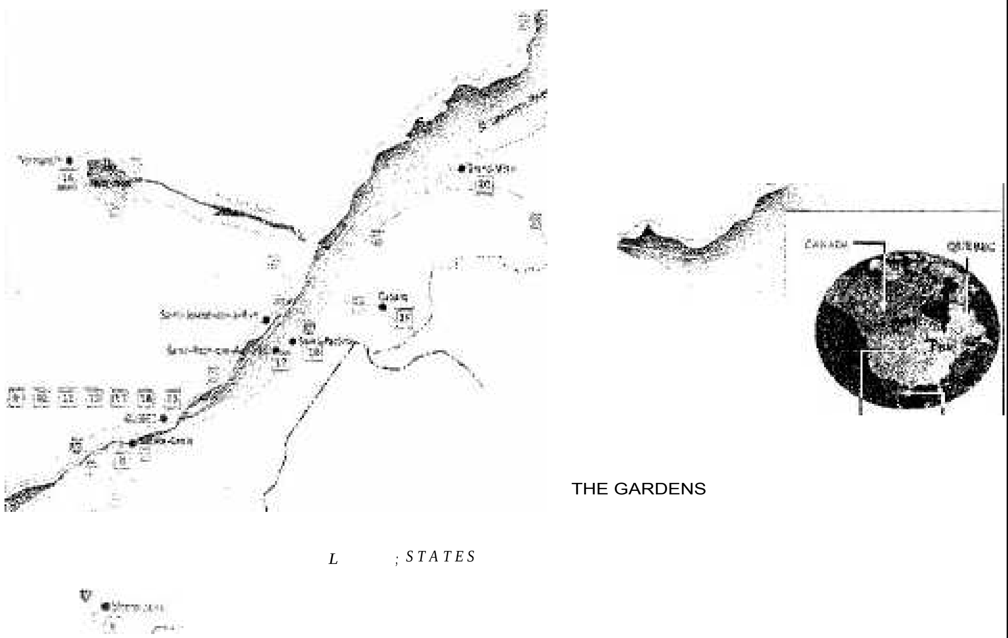
- A similar climate and growing seasons to Ontario to the extent that there is marked seasonality. Therefore we eliminated the Caribbean region and Southern U.S..
- Each jurisdiction hosts at least one major horticultural attraction.
- Gardens and gardening are highlighted in the respective tourism marketing strategies.

A. Tourism Quebec

As part of an overall marketing strategy aimed at attracting U.S. visitors to Quebec, Tourism Quebec launched a series of niche theme tours. The first of the series was launched in May, 1999, and featured a select group of gardens. The 2000 season featured the Churches of Quebec and following shortly after was Aboriginal Way. These three tours will be part of a suite of tours, and were marketed with a consistent look and feel. This analysis focuses on the first of the themed tours—the Gardens of Quebec.

The Garden Tour featured 20 gardens in 12 cities and towns (see Exhibit III-1).

Exhibit III-'I
Tour of Quebec



Source: Tourism Quebec

To create the tour, Tourism Quebec partnered with two organizations: a Garden Association and a private tour operator. Tourism Quebec's partnership with the Garden Association brought two things. First it relieved Tourism Quebec of the requirement to understand the product because in order to be part of the tour the garden had to be a member of the Association. In this case the Garden Association had a strict set of criteria that the gardens had to meet in order to qualify for membership:

- Ability to receive bus tours (for example have appropriate reception capabilities and at least minimum public facilities).
- Offers a well-maintained site with a variety of interesting plants.
- Operates a bilingual facility.
- Focuses on the tourist market(s).

Second, and because of the self-monitoring the Garden Association undertook, Tourism Quebec was relieved of the responsibility to monitor existing sites for the quality of the experience.

Tourism Quebec also brought on board a tour operator that offered a tour package to both the fully independent traveler (FIT) and group tour market. The tour operator had neither an in-depth background knowledge of gardening and horticulture, nor expert guides, relying instead on the attractions to provide the interpretative program. On the other hand, the tour operator was small and flexible enough to offer customized packages for individual requests. The tour operator offered five tours ranging from three to seven nights. Each package included transportation and a sightseeing tour of Montreal and Quebec City.

The Gardens of Quebec brochure was distributed largely through the National Gardening Association in the U.S. by direct mail to 100,000+ members. An advertisement was also placed in a U.S.-based national gardening magazine and in a landscape architect magazine.

While the garden tour website of Tourism Quebec received lots of hits, Tourism Quebec was disappointed in the number of visitors to the gardens. In 1999, the tour operator received 12 FIT tour requests from the U.S. In 2000, Tourism Quebec was hoping to generate more interest through their website, and through distribution of the pamphlet at events such as Canada Blooms. However, Tourism Quebec was not undertaking a mass mailing and the 2000 niche marketing theme was the Churches of Quebec.

Both Tourism Quebec and the tour operator agree that the brochure was sent too late. The brochure was distributed in May, but really should have been sent in January or February when people are starting to plan their spring/summer vacations. When reviewing the brochure and the website the primary reason (or the unique selling proposition) for travel to the gardens and arboreta was not made clear. Apart from this there is little understanding as to what extent price, the distribution channel, or a misguided market focus played in the program. Further, whether or not the marketing effort was appropriate for the niche market targeted, or whether there simply was insufficient interest in horticultural attractions and tours of this kind, is not clear.

l lowever, we have noted that Tourism Quebec was successful at partnering with an Association that provided a set of criteria that each garden had to meet to qualify for membership and that subsequently self-monitored the sites for quality of experience.

Tourism Quebec undertook a niche marketing strategy targeted principally at the serious and expert gardener in the U.S., but at the same time did not make clear what differentiated their gardens and arboreta from gardens and arboreta anywhere in the world. Providing a quality product may not then simply he enough to attract a wide audience without a clear and sustained marketing effort.

B. Victoria, B. C.

While Victoria is positioned as the "Garden City" and is the "home base" for travel to Butchart Gardens, little marketing and product have been developed around the garden and horticultural attractions as a primary travel motivator. The focus of tour and packaged product historically has been on heritage and the British cultural attractions and on being outdoors (cco-tourism). On the other hand, the gardens and flower baskets of Victoria are integral to the overall look and feel of the City and these feature prominently in all marketing materials. Therefore, while gardens and gardening is an integral component of the overall tourist experience, horticultural tourism is not viewed as the primary motivator.

Nevertheless, Tourism Victoria in cooperation with Tourism B.C., has been successful at promoting horticultural tourism to the Japanese and Taiwanese markets through JTB tours primarily focused on the blossoms in the spring. The spring blossom tours have been undertaken for the last four years and this year, at the request of JTB. A hands-on element has been added whereby tourists are taught how to create their own flower baskets.

JTB and other tour operators in general are requesting more experiential and hands-on learning components of the tours. In fact, Tourism Victoria has been noticing an increasing interest in their gardens and how to garden and has identified this as a current gap in their tourism product.

Some packaging of the horticultural product has occurred in that several gardening tours and educational programs have been developed, and these draw upon a number of sites and venues, including:

- Beacon Hill Park
- Royal Roads University and Hatley Castle Park
- Royal British Columbia Interpretative Programs
- Home Garden Tours offered by the Victoria Horticultural Society
- Chosin Pottery Studio and Gallery, including Japanese inspired gardens
- Victoria's Secret Gardens, a tour of three private gardens
- Butchart Garden Tours
- Victoria Butterfly Gardens
- Crystal Garden Self-guided tours
- Government House Gardens
- Horticultural Centre of the Pacific
- Ravenhill Herb Farm

Without a doubt, the number and variety of attractions and programs provide a critical mass of attractions for tour and packaged product. However, Tourism Victoria stated that despite the number and variety of attractions and tours, still further opportunities to leverage the garden attractions exists. For example, Tourism Victoria would like to see more lectures offered, learning tours, and hands-on demonstrations.

Butchart Gardens is clearly one of the most popular attractions in the Victoria area, and exit surveys conducted by Tourism Victoria in 1999 indicated that 33% of total visitor groups in 1999 visited the attraction where at least one member participated in the activity. By comparison 26% went to the Royal BC Museum and 11% went to Craigdarroch Castle. Other popular activities were walking/hiking (57%), visiting parks (34%), historical sites (30%) and shopping for arts/crafts (29%) and clothing and accessories (46%). Less participation was recorded for bird watching (5%), bicycling (3°/fl), golf (4%), guided tours (15%) and whale watching (6%).

Butchart Gardens attracts approximately 1.2 million visitors a year, the bulk of which visit in May through October. While the attraction had been experiencing an increase in traffic up until three years ago, in the last three years visitation has been leveling off. Butchart Gardens is positioned in the market as a unique tourist destination that offers a beautiful and delightful environment. Butchart Gardens is not targeted expert or serious gardeners, rather people who enjoy learning about and explore new and different surroundings. In this regard Butchart Gardens offers a set of programming that would appeal to the broad group and FIT tourist market advertising in travel magazines and through the travel trade.

Yet Butchart Gardens is acknowledging that the visitors that are coming to the display gardens are substantially better educated about gardens and gardening largely as a result of the substantial amount of home and garden media available. Butchart also acknowledges that they may have been too slow to target and appeal to the changing interests of their visitors and are currently undergoing a review of product and programming to incorporate more hands-on educational programming. On the other hand, Butchart Gardens is also intensively developing the product to appeal to visitors in the off-season, bolstering the fall and winter program to include arts and crafts demonstrations that are not garden related, but intended to help visitors prepare for Christmas.

In Victoria, gardens and gardening has not been viewed as the primary motivator to travel but as an integral part of the experience. In fact currently Victoria has little product that would directly appeal to the expert and serious gardener, rather marketing efforts have been targeted to those people interested in history and culture, who like to be outdoors, and who enjoy beautiful surrounding and things. However, Victoria and the Butchart Gardens have noted that tourists and tour operators are becoming more demanding and expecting not only quality product, but also an opportunity to learn through hands-on experience and demonstrations. The influence of the media and the consumer home and garden market is making a substantial impact on Victoria's garden-related tourist product. While the product may still not be directly targeted at the serious and expert gardener, Victoria's attractions and tours are changing to meet the needs of a more knowledgeable and demanding consumer.

Pennsylvania

Pennsylvania is home to two major horticultural draws (the Philadelphia Flower Show and Longwoods Gardens) and a substantial number of attractions that either feature gardens as the primary experience or as part of an overall cultural or heritage experience. Pennsylvania is self-described as a "hot bed" of gardening activity.

Interest in gardening in the area arises from substantial historical and cultural roots dating to the early 1800s. The Pennsylvania area was historically the centre of wealth and the population had the financial strength to invest in beautifying their homes with plant materials brought from France and England. They subsequently formed gardening clubs and societies and eventually opened formal gardens such as the Historic Bartram's Garden. Today Pennsylvania including adjacent Delaware and New Jersey is set apart because of its critical mass of gardens and horticulture and draws from all over the U.S_ and Canada.

Horticultural tourism to the region is highly influenced by one blockbuster event — the Philadelphia Flower Show. As demonstrated in Exhibit III-2, the Philadelphia Flower Show, held during early March, drew approximately 285,000 people in 2000. Approximately 50% of the visitors were between the ages of 36 and 55 and indicated above average household income. Also of note 45% of visitors to the Flower Show traveled to the Show from outside the Tri-State area.

Exhibit I11-2
2000 Philadelphia Flower Show Visitor Survey

Based on an attendance of 285,000

(Preliminary results as of March 27, 2000)

	Percent	# of Visitors
Male	21	59,850
Female	79	225,150
Age Breakdown:		
Under 36	17.7	50,445
36 - 55	49.8	141,930
55 - 65	*20.4*	58,140
66+	12.1	34,485
Annual Income:		
More than $100,000	22.6	64,410
Between $75,001 - $100,000	14.8	42,180
Between $50,001- $75,000	25.4	72,390
Visitors from PA. NJ, DE	55	156,750
Visitors from beyond Tri-state area	45	128,250
Staved overnight in area hotel during show	10.2	29,070
Connected to internet	73	208,050

Source: The Pennsylvania Horticultural Society

The Philadelphia Flower Show is produced by the Pennsylvania Horticultural Society and while gardens and gardening is its theme, the Society does not necessarily target gardeners. Rather the horticultural society targets people who are tired of winter and are looking for something that is colourful and beautiful. By not targeting gardeners, the Pennsylvania Horticultural Society argues that the Flower Show has successfully moved beyond a narrow market and broadened the appeal. Less emphasis is placed on demonstrating gardening technique for local gardeners and more is placed on bringing in the unusual or the unique—in other words, more emphasis is placed on demonstrating the "Wow" factor or the "Must See" appeal.

On the other hand, and apart from Longwoods, the gardens in the area have been hard pressed to attract substantial tourist visitation. The Morris Arboretum has built a fernery that sets it apart, and its research is valued in the expert horticultural community, but may not be attractive to the everyday gardener. Therefore, while Pennsylvania is valued by the Expert Gardener and some of the Serious Gardeners, it is not currently top of mind as a `garden destination'.

To remedy this, 23 of the public gardens, arboretums and historic houses in the area formed the Gardens Collaborative to market their attractions through publications, a direct mail program, partnering with regional tourism organizations, and other outreach programs. Yet these efforts have not made a measurable increase in visitation.

The Pennsylvania Horticultural Society argues that the general public will not travel to see a garden but will travel to see something unique and to be entertained. Longwood Gardens does an excellent job at attracting visitors, not so much by informing visitors about gardening, but by attracting them as a must see destination with significant entertainment value. At Christmas, for example Longwood Gardens exhibits a massive display of outdoor lights, provides choral music entertainment, and offers Christmas programming targeting tourists and groups.

Similar to Victoria, then, despite the fact that Pennsylvania is home to two major horticultural attractions and a substantial number of horticultural attractions, horticultural tourism has not been marketed as the primary motivator to travel but as an integral part of the experience. Efforts are underway however to capture the interest and enthusiasm evidenced in the consumer market and transform the broad set of attractions that may appeal to the serious and expert gardener to appeal to a wider tourist market by offering unique attractions that are entertaining and delightful.

D. Conclusion

From these case studies, we can offer the following broad conclusions:

- Through the influence of the home and garden media, the tourist market for horticultural product is changing and demanding more and better programming. One could argue that even the everyday gardener and the casual admirer of gardens is becoming more sophisticated in gardens and gardening and is demanding a more refined product, perhaps incorporating a learning environment, but certainly incorporating elements that are uniquely entertaining and delightful. Destinations such as Victoria and Pennsylvania that host a number of mature attractions are actively searching for products and programming that will appeal to this broader market.
- For the most part, gardens and gardening have not been marketed as the primary motivator to travel but as an integral part of the experience. This approach may be changing, however, as destinations are taking note of the growth in interest in gardening in the consumer market.
- Tourism Quebec's experience marketing to the expert and serious gardener niche indicates that a one-time mass mailing of a professional brochure focusing on a tour of select gardens and arboreta but not differentiating the experience may not be sufficient. However, Tourism Quebec was successful at partnering with an association that provided a set of criteria that defined a quality product and provided self-monitoring of the sites.
- Commercially successful attractions such as Longwoods and Butchart Gardens are not targeting gardeners, but are targeting travelers that enjoy and want to explore beautiful, unique and entertaining surroundings. These gardens are display gardens and are differentiated from botanical gardens and arboreta. Historically these two types of gardens have remained separate. We may be seeing a convergence of the product offerings as display gardens move to offer a more substantial botanic offering and botanic gardens and arboreta become more focused on providing an entertaining visitor experience.

Whatever the focus of the attraction or horticultural product, the product must be able to demonstrate the "wow" factor or the "must see" appeal.

IV. Assessment of Potential Opportunity

In North America, visitation generated by interest in gardens and horticulture is only just emerging and is likely being fueled by activity in the consumer marketplace. People that garden are interested in gardening as relaxation, being outdoors, and enjoying beautiful surrounding and things. These same reasons may be why people would be interested in participating in a horticultural tourism product. We believe that given the strength of the consumer market and given the fact that Ontario is home to several strong garden themed products, a potential opportunity exists to further develop existing attractions and package them into a unique product offering.

We believe at least two markets may be defined—the expert and serious gardener; the everyday gardener and casual admirer. The product and communication strategy to reach these target markets may not be the same.

A substantial linkage between the activity of gardening and travel is not apparent outside of niche markets. The potential for attractions where gardens and/or gardening are the primary focus is still limited unless the experience can be made to appeal to a broader market. This appeal could be provided by programming, additional elements, or linkages. For example, Cullen Gardens attempts to broaden appeal by including of a miniature village. Longwoods and Butehart Gardens provide extensive programming such as music festivals, children's camps, and learning seminars.

Before tourists can start to think about Ontario as the place-to-go for experiencing gardens and gardening, the product must be differentiates in the market and provide a unique experience that attracts and delights tourists. To further this appeal, Ontario horticulture attractions might be packaged with a host of related and complementary product that target specific markets. This chapter provides a framework to assess the potential strength of a tourist region for developing a well-defined horticultural tourism product.

Existing Horticultural Product in Ontario

Currently Ontario has not made a pro-active effort to develop horticultural tourism. Research from the Ontario Ministry of Tourism Culture and Recreation suggests that a number of small horticultural-related festivals throughout the province. Some of these may be grown to draw attention.

Ontario hosts two established, and two emerging, horticultural events:

- Canada Blooms, Toronto
- Tulip Festival, Ottawa
- Blossom Festival, Niagara Falls
- Lilac Festival, Royal Botanical Gardens, Burlington

Each of these events attracts domestic and international tourists and firmly positions Ontario as a leading destination for gardens and gardening. These events are unique and can be leveraged.

Ontario is home to several attractions that offer a unique horticultural experience. The Royal Botanical Gardens has unique plants and collections that are internationally respected, as are the gardens of the Niagara Parks Commission. Appendix D provides a preliminary list of horticultural attractions in Ontario. More research is required as to other unique offerings.

No true broadly themed horticultural packages were discovered, although the Ontario Tourism Marketing Partnership was aware of the following niche packages:

- A brochure outlining a tour of some of Southern Ontario's main garden attractions (developed largely as a take-away for Canada Blooms) was created cooperatively by several attractions.
- Classical 96 and 103 FM of Cobourg sponsors a self guided tour of various gardening related businesses from Pickering to Belleville to Peterborough. The tour is marketed to tourists through radio advertisements and brochures offered at pick-up points and participating garden centers.

- The Garden Travel Journal, a relatively new venture, describes potential tours of private and public gardens, local shops and artisans and "garden-friendly" restaurants and inns.

Ontario, then, has four events and some strong attractions plus a number of other unique gardens and gardening-related businesses, some of which may be of interest to tourists.

Preliminary Criteria for Assessing Potential of Horticultural Tourism Attractions and Products

We have identified five criteria for assessing the potential for developing a horticultural tourism attraction or product:

- Regional portfolio
- Attraction
- Events and programming
- Infrastructure support
- Finance and marketing

In general, a horticultural attraction that appropriately addresses these criteria is a suitable candidate for further development.

Within each of the four criteria, we identified specific questions to determine whether the overall criteria are met. Several of the questions are effectively show stoppers on their own, and failure to receive a positive response is reason enough to eliminate the tourism product from further consideration. Most of the questions however, are not absolute prerequisites, but are intended to provide guidance in assessing the overall category.

This framework is preliminary in nature and will require further development as more information and understanding of horticultural tourism evolves (see Exhibit IV-1).

Exhibit IV-1
Suggested Evaluation Criteria for a Region

Regional Portfolio

- Are there sufficient number and variety of events, gardens and other related attractions?
- Are there complementary tourist attractions in the area?
- is the season long enough and consistent enough to offer a constant product?
- Does the garden-theme fit with regional and local marketing strategies?
- Is there a large urban centre or a developed tourist market upon which to draw demand?

Attractions

- Is the attraction accessible? Is it close to an urban centre or to a major tourism sector?)
- Can the site accommodate sufficient capacity or is there potential to expand the site?
- Is the site interesting enough to attract a broad audience including everyday gardeners and casual admirers?
- Is the site well-maintained and of an appropriate level of quality?
- Are there adequate public washrooms?
- Is there adequate on-site food and beverage?
- Is there adequate on-site retail?

Events and programming

- Are events offered to draw repeat visitation and extend the shoulder seasons?
- Does the attraction offer an educational component?

Infrastructural support

- Is there sufficient capacity of appropriate overnight accommodation?
- Are there active horticultural societies in the region?
- Are there tour operators prepared to offer product in the region'?
- Is there adequate signage?

Finance and marketing

- Is the site marketed to communicate the unique or special features?
- Do revenues and grants cover operating and capital costs?

Source: KEAMG

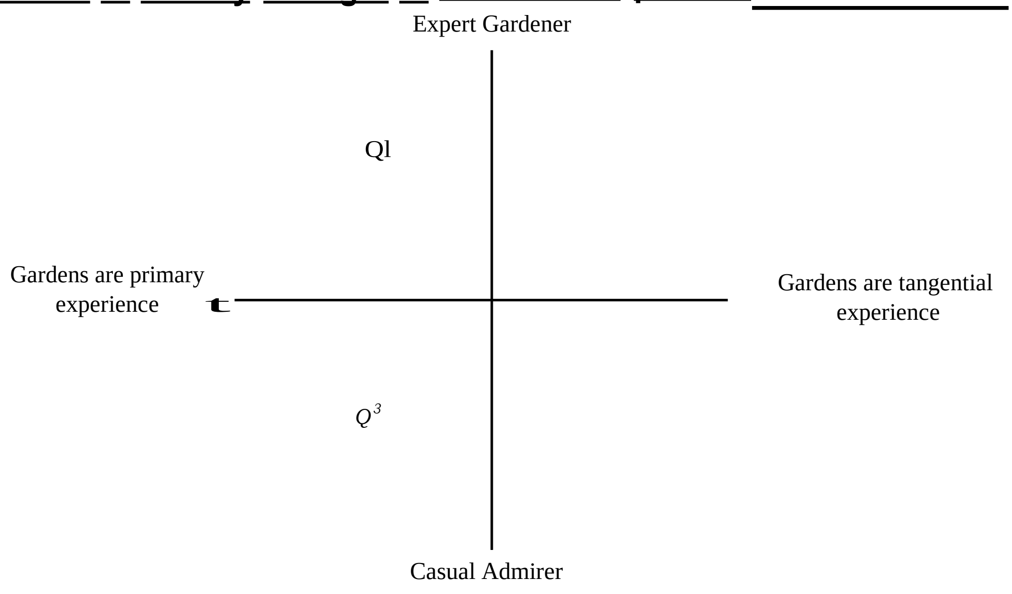
At a minimum, the horticultural site must be pristine and of high quality_ Serious and expert gardeners are likely to expect to see leading edge, evolving concepts. And yet it is difficult for most sites to keep improving and changing every year, particularly when budgets are tight.

Given these general indicators, is there enough high-quality gardens and horticultural related product to position Ontario as a gardener's destination? Ontario's horticultural product may not be sufficiently developed or linked and marketed in any critical fashion.

Framework for Assessing the Strength of a Horticultural Tourism Region

A matrix that can be applied to assess the strength and positioning of horticultural product within a geographical region is illustrated in Exhibit IV-2.

Exhibit IV-2
Matrix to identify strength of horticultural product



Source: KPMG

Using the horizontal axis to classify how gardens are positioned within the attraction and the vertical axis to classify the level of interest a visitor has in gardening, we have developed four quadrants:

- Q1 - Attractions that primarily focus on gardens and horticulture targeted at the serious and expert gardeners are likely to appeal to niche horticultural markets. Attention may need to be paid to rounding out the experience for everyday gardeners and casual admirers, making them less intimidating and more accessible. Given the right programming and facilities, these attractions may prove to be of sufficient quality to be stand alone destinations. An examples of an attraction in this quadrant may be Royal Botanical Gardens.
- Q2 - Attractions that target the expert and serious gardeners but where the gardens are tangential to the experience may be characterized as heritage or cultural attractions that offer a credible horticultural product to the serious and expert gardener. These attractions would likely benefit from highly targeted, niche marketing strategies. An example of an attraction in this quadrant would be a heritage estate that offers a unique collection of heritage plants.
- Q3 - Attractions that target the everyday gardener and casual admirer in an experience primarily focused on the gardens will likely require marketing that highlights their rare beauty and fun experience, rather than the gardens themselves These gardens will likely provide, or be linked to, additional entertainment. An example of attractions in this quadrant may be the Cullen Gardens, Longwood Gardens, and Butchart Gardens.

  Q4 - Attractions that appeal to the everyday gardener and casual admirers but provide gardens as a tangential experience will most likely use the gardens as providing value-added experience to an overall experience and would benefit from additional infrastructural support to provide the "wowl" An example of an attraction in this quadrant may be the Toronto Zoo and the grounds at the parliament buildings in Ottawa.

The following analysis uses this matrix as a tool for the preliminary assessment of a region's strength. However, a number of other factors must be taken into account, including the alignment of developing a horticultural themed product with the overall marketing strategy of the region and the attractions themselves.

Potential horticultural destinations

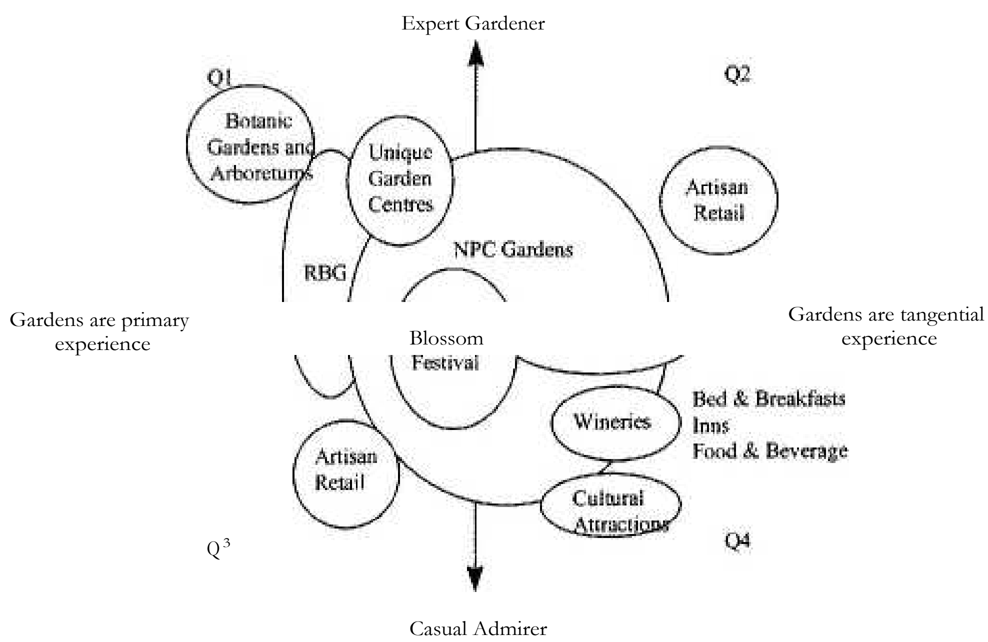
We have applied our evaluation framework to a sample of attractions in several of Ontario's tourist regions (Niagara - Hamilton, Eastern Region, and Greater Toronto Area) for illustrative purposes. We caution that this analysis is preliminary as it is based only a cursory review of the attractions rather than in-depth knowledge of the attractions available in these regions.

1. Niagara — Hamilton Region

The Niagara - Hamilton tourist region is unique in Ontario because a significant amount of horticultural product exists in a relatively small area that already hosts a notable tourist population.

Niagara - Hamilton may hold the greatest potential for developing and packaging a horticultural tourism product. This area is rich with public and private attractions that would appeal to a variety of market segments from unaware day-trippers looking for a pleasant family outing, to serious and expert gardeners (see Exhibit IV-3). As well, a number of related and complementary products (cultural and historical attractions, wine tours, food and beverage, gardening retail, gardening accessories) serve to support and sustain interest.

Exhibit IV-3
Assessment of Niagara - Hamilton



Source: KPMG

In Niagara Falls, the Niagara Parks Commission (NPC) enjoys a critical mass of horticultural attractions including outdoor gardens, indoor greenhouses, and linked attractions such as the Butterfly Conservatory and garden accessory retail. The Horticultural School, established in 1936, is known and respected in international gardening circles bringing the site international credibility. Its botanical gardens offer a diverse and sophisticated variety of plantings that appeal to the expert and serious gardeners as well as the everyday gardeners and casual admirers.

The NPC also benefits tremendously from being close to related and complementary tourism product in the area. Wine tours, eco-tourism, cultural tourism are all significantly represented.

The Royal Botanical Gardens in Burlington has 2,700 acres of property that includes extensive natural areas featuring rare Carolinian forest, world's largest lilac collection, numerous specialty gardens (including irises, roses and spring bulbs) and educational programs at all levels. The RBG reports that total visitation is approximately 500,000 per year and is projecting growth of 5-10% per year

RBG also reports a strong visitor component to the gardens as demonstrated in Exhibit IV-4, drawing approximately 38% of visitation from outside Ontario.

Exhibit IV-4
Visitor Origin at Royal Botanical Gardens

	%
Hamilton & Halton Regions	27
Other Ontario	35
Other Canada	10
USA	17
Other International	11
	100

Source. Royal Bolanical Gardens

Visitation at RBG is highly seasonal and very dependent on the weather, although the events and outreach programs are being expanded to extend the season. Nevertheless, as it stands, RBG is a credible destination for the serious and expert gardener. RBG's ability to attract a broader audience depends upon its linkage to complementary programs and other tourist attractions in the area.

Aside from NPC and RBG Festival Country benefits from other attractions. Towns such as Niagara-on-the-Lake, and Stratford are significant attractors for gardening enthusiasts, offering for example group tours of private gardens, and supporting arts, cultural, retail and food and beverage opportunities.

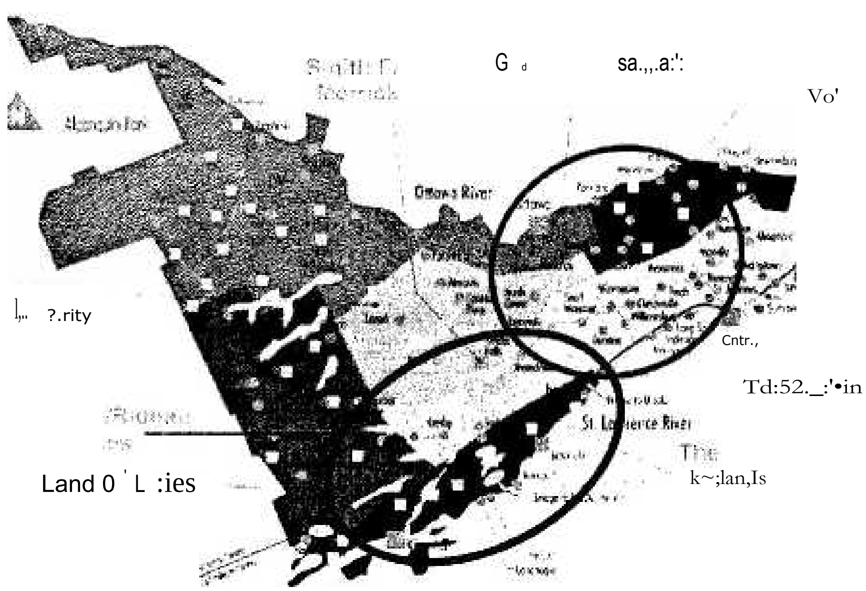
The Niagara – Hamilton area also offers historical attractions such as Dundurn Castle, Fort George and Fort Erie. The extent to which these and other historical attractions offer credible displays or heirloom gardens is not known.

Of note a critical number of private sector operators exist, such as the Copper Leaf in Jordan. When these products are linked with the various artisan studios and garden-centres, the private sector could animate the horticultural product significantly.

A significant amount of horticultural product, both from the private and public sector, could be packaged and marketed to either the serious gardener market or the market characterized by the casual admirer. As important, the horticultural tourism product fits within the regional marketing strategy.

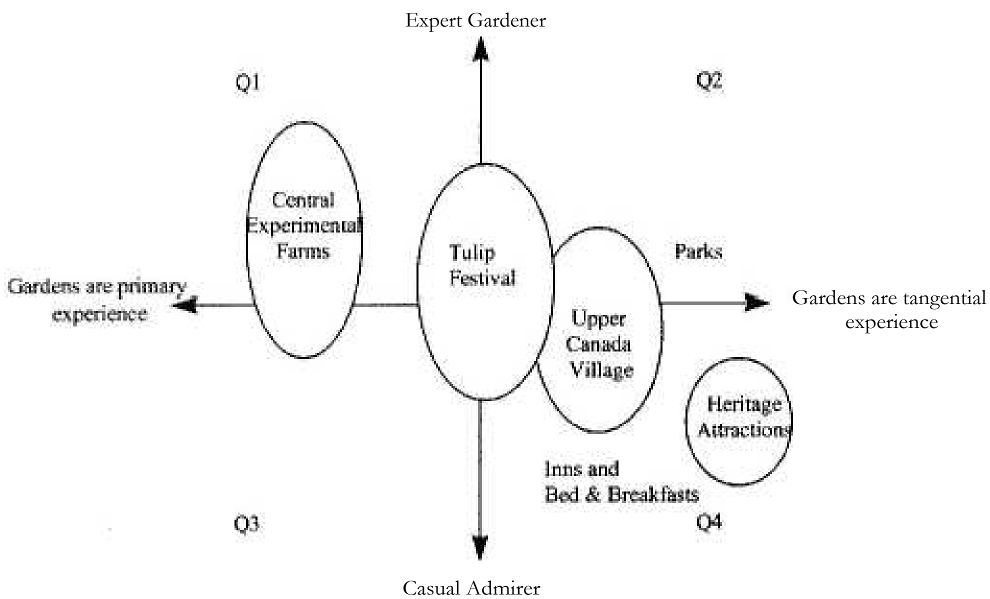
2. Eastern Ontario

Eastern Ontario may have sufficient horticultural product, particularly within the areas circled, but the products that currently exist are likely to be for the most part tangential to the overall tourist experience.



To develop its full horticultural tourism potential, Eastern Ontario may require investment in infrastructure and development of stronger marketing linkages as shown in Exhibit IV-5.

Exhibit IV-5
Horticultural related attractions in Eastern Ontario



Source: KPMG

Ottawa is home to the Tulip Festival, an event that draws significant visitation annually. Yet aside from this event the strength of the remaining horticultural product in the region is unclear. The region has beautiful towns, gardens and parks and established historical attractions such as Upper Canada Village.

The horticultural experience at the Upper Canada Village run by the St. Lawrence Parks Commission (SLPC) is currently tangential to the attraction. In addition, with budget restraints, the SLPC has not invested in its gardens and these may need to be revitalized if they are to be fully exploited. Nevertheless, a number of opportunities were identified by management:

- Cultivating unique seed varieties and market these to tourists and gardeners.
- Extension of heirloom plant sale
- Development of a horticultural school

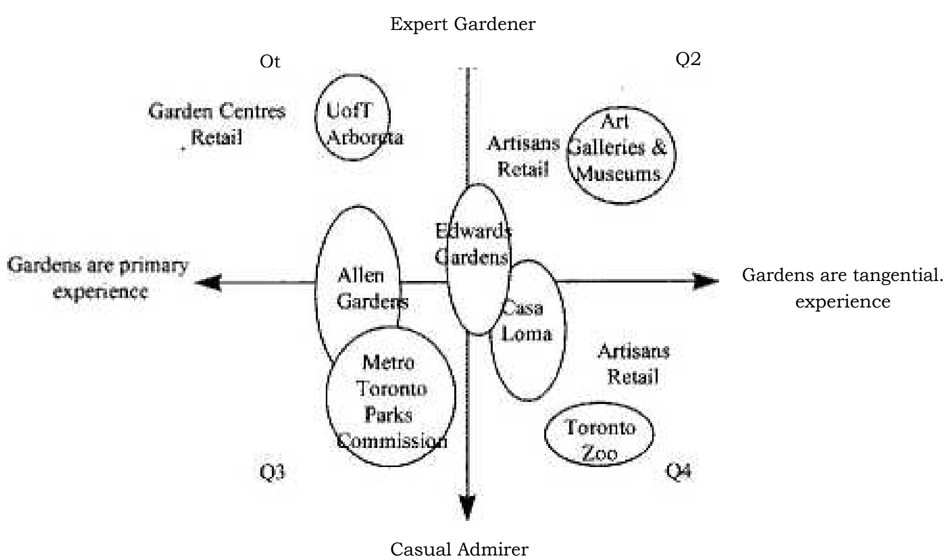
Further investigation is required to determine the full extent of attractions, the strength of the product and required investment.

3. Greater Toronto Area

Metro-Toronto hosts Canada Blooms and has quite a few attractions and parks that provide a horticultural experience.

Our analysis has not provided sufficient data on how strong local attractions may be in attracting expert and serious gardeners (see Exhibit IV-6).

Exhibit IV-6
Assessment of Greater Toronto Area



Source: KPAMG

Without a doubt, Toronto is strong in retail and other support amenities, however further investment may need to be made in the attractions in order to draw tourist demand.

Conclusion

Ontario has two established and two emerging events, some strong horticultural attractions and a great many complementary attractions and services. Yet are these products sufficient to generate interest? Rather than assess the horticultural product on a provincial basis, we propose that if we break Ontario into regions, then a better picture of the strength of Ontario's horticultural product emerges. Using the matrix developed for assessing the strength of Ontario's horticultural products, it becomes clear that one tourist area, Niagara - Hamilton, has sufficient product from both the private and the public sector to warrant further opportunity analysis. Other tourist areas, such as those in Eastern Ontario and in the Greater Toronto Area may also represent opportunity, but the potential is less clear.

V. Conclusion and Next Steps

KI'MG, believes that sufficient interest exists in gardens and gardening as an integral part of the tourist experience and sufficient product is available (particularly in Niagara-Hamilton area), to warrant further research into horticultural tourism.

The next step to he taken is to begin the analysis of the high-priority tourist regions using the matrix developed. Niagara-Hamilton would be a logical tourist area to begin the process and then roll-out to Eastern Ontario and so on as demand arises.

To develop a better understanding of the potential partners and infrastructure and marketing requirements, the following data should be developed for high priority regions or as the need arises:

- Inventory of product in targeted regions.
- Inventory of active horticultural associations:
  - Appendix E lists horticultural organizations based in Ontario, but this list may not be inclusive.
  - Not only are the members of these organizations a key market segment, they are also a good source of information
  - Horticultural and gardening societies may partner with the Ministry of Tourism to provide expert quality assessment of the attraction and continual monitoring.
- Inventory of active related associations:
  - An opportunity may exist to partner with other associations that provide complementary products.
- Inventory of potential private sector partners:
  - Large garden centres such as Picov's Garden Centre or Richter's Herbs that have an active interest in attracting visitors from outside the local area.

Horticultural and lifestyle media such as Canadian Gardening Magazine, Plant and Garden Magazine, Women's Television Network, Home and Garden Network, Garden Travel Journal.

Attractions such as Cullen Gardens

Tour operators

Major retailers with garden product (such as Loblaws) and artisan shops such as the Copper Leaf in Jordan.

Private sector partners can bring additional financing, but will also bring a unique perspective and experience to marketing strategy, infrastructure and product development.

Further analysis as to correct positioning of the horticultural tourism product.

Evidence from our case-study research suggests that tourists are not looking for a tour of gardens and arboreta but looking for a "must see" attraction offering an extraordinary experience. The experience can be anything from a learning program, to a unique/colourful/large plant species to a family outing in an unparalleled setting.

Additional market research will be required to discover who is going to horticultural attractions, when and why, and to find out what is working and what is not.

Each Ontario tourist region offers a unique mix of horticultural products and complementary attractions and services. As a result, careful consideration must be given to the potential for developing horticultural tourism (e.g. to a limited or a significant extent) to position the region's "must see" appeal firmly in the mind of the consumer. While gardens and gardening may not prove to be the primary motivator to travel to a region, regions such as Niagara-Hamilton may prove to offer sufficient product and interest to leverage existing resources and tap into an emerging market potential.

VI. Appendix

A. Literature Search

B. Key Stakeholder and Destination Interviews

C. Experiences Sought by Travelers that Visit Garden Attractions

D. Preliminary List of Potential Horticultural Attractions

E. Preliminary List of Horticultural Associations

A. Literature Search

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Travel Industry Association of America. *Tourism* 2000: *Trends and Outlook*, Speech. www.tia.org.

Virtual Gardener. www.vg.com

B. Key Stakeholder and Destination Interviews

Stakeholder Interviews

- St. Lawrence Parks Commission

  Mike Paradis, Bruce Fitzgibbon, Bruce Henbest,
- Canadian Nursery Landscape Association
- St. Clair Parks Commission
  - David Cram
- Niagara Parks Commission
  - Debbie Whitehouse, Murray Mold
- Landscape Ontario
  - Verna Loewen
- Ontario Tourism Marketing Partnership
  - Janice Schylar
- The Garden Travel Journal
  - Peter Howard
- Canada Blooms
  - Allison Findlay, Marketing
- Royal Botanical Gardens
  - Frank Cornelia, Marketing, Sharilyn Ingram, Director
- Flowers Canada
  - Gary Watson

  American Bus Association

Case studies

- Tourism Victoria, Russ Cowan, Marketing
- Tourism B.C., Grant McKay, VP Marketing
- Butchart Gardens, Heather Haywood, Acting Marketing Director
- Tourism Quebec
- Tour Chanteclerc
- Philadelphia Hospitality, Marilyn Lucov, Tour Coordinator
- Pennsylvania Horticultural Society, Lisa Stefano, Marketing
- The Gardens Collaborative, Barbara Klazyska
- Greater Philadelphia Tourism Marketing Corporation, Sharon Rossi, Director of Advertising and Publications

Summary of Stakeholder *Interviews*

The following is a summary of comments received from the stakeholder inter iews:

- A vacation product focused on the gardens of Ontario will probably be a seasonal product extending from May to September. Interest in gardening and gardens wanes through August and declines rapidly in the fall.
- Sites based on a horticultural theme will be challenged by how to round out the season require seasonal activities - for example themed events in the fall and winter.
- Outdoor gardens and festivals are highly dependent on the weather and general environmental factors and these are notoriously hard to predict. For example, a festival based on a blossom theme may suffer dramatically if the blossoms peaks too early or too late.
- Tourists in general are becoming more demanding, and people interested in gardening may be especially demanding. As consumer research for gardening product has indicated, the horticultural consumer is looking for depth of product and quality. They are looking for educational value, but they are also looking for

an entertaining environment. Ontario's attractions may need to refocus some of their programming to accommodate visitor requirements.

- Garden tours of public and private gardens have been a staple of traditional horticultural tourism. However these tours have traditionally been organized at a grass--roots level. While this may be a source of their charm, if we are to market these tours more extensively to a wider audience, more attention will need to be paid to quality of the experience and capacity.
- Vacations motivated by gardens and gardening may appeal to the shorter, "getaway" market.
- Because consumers are not necessarily aware of the horticultural attractions available, the overall marketing strategy must first be to make visitors aware of product why they should visit these attractions, and then make it easy to go to the attractions.
- The hook to go to a garden-based attraction may be a strong educational component in a family oriented environment.
- Attractions offering a gardening theme must first focus on the visitor and provide a "WOW" experience

  Associations and groups such as the Gardening Committee of Ontario may not be interested in promoting their attractions. Generally, they are not sufficiently organized, nor do they have the time, to undertake the massive marketing effort required to position Ontario as a destination known for its vast array of gardening attractions.
- The industry has a plethora of small, private businesses that will be difficult to reach, but add vitality and a unique charm.
- Garden tours of public and private gardens have been a staple of traditional horticultural tourism. If these tours are to be developed to attract more visitors, gardens may need to be monitored for quality and given appropriate marketing and financial support. Some of the gardens are small and are not equipped to handle bus groups. Further, some may not want to be open to the public throughout the season.

C. Experiences Sought by Travelers that Visit Garden Attractions

1. Travel Experiences

Canadian		American	
Rest, Relax and Recuperate	84.1%	Rest, Relax and Recuperate	86.2%
Visit friends or relatives who live in other cities or countries	78.9%	See natural wonders and important natural sites	80.6%
See natural wonders and important natural sites	72.7%	Visit friends or relatives who live in other cities or countries	79.8%
Spend quality time with the family away from home	70.9%	Visit historical sites and important places in history	77.6%
Visit historical sites and important places in history	65.8%	Spend quality time with the family away from home	77.2%
Spend time with a group of good friends	60.8%	Experience different cultures and ways of life	65.7%
Experience different cultures and ways of life	55.7%	Experience unspoiled nature	64.0%
For intimacy or romance	53.8%	Experience adventure and excitement	60.2%
Experience unspoiled nature	53.2%	Spend time with a group of good friends	59.8%
Escape winter weather	52.8%	For intimacy or romance	553%
Experience city life (e.g., nightlife, shopping, museums)	48.9%	Experience city life (e.g., nightlife, shopping, museums)	53.6%
Experience adventure and excitement	48.7%	Experience the good life with fine cuisine, good wine, being pampered	49.8%
Experience the good life with fine cuisine, good wine, being pampered	47.2%	Participate in a hobby or sport	45.9%
Participate in a hobby or sport	44.2%	Be someplace that feels familiar and safe	43.0%
Be someplace that feels familiar and safe	43.8%	Escape winter weather	37.1%

Canadian		American	
Visit a popular, trendy place	32.8%	Visit a popular, trendy place	33,5%
Visit casinos and gamble	23.0%	Participate in a hands-on learning experience	23.1%
Participate in a hands-on learning experience	17.3%	Visit casinos and gamble	11_4%
Spiritual or religious experiences	16.6%	Spiritual or religious experiences	0.0%

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2. Cultural and Shopping Experiences

Canadian	";'o	American	%o
Major Theme Parks/Attractions	100.0%	Major Theme Parks/Attractions	100.0%
Culinary / Wine Activities	91.1%	Shopping	*94.9°/*
Shopping	89.9%	Culinary / Wine Activities	93.9%
Zoos, Aquariums, Etc	81.2%	Zoos. Aquariums, Etc	92.7%
Read or Relaxation or Personal Interest	74.3%	Art Galleries ,· Museums	81.5%
Art Galleries i Museums	72.4%	Carnivals/Fairs/Cultural events	80.1%
Carnivals/Fairs/Cultural events	66.2%	Natural Wonders	78.7%
Natural Wonders	61.0%	Cultural Performances	73.1%
Movies	60.2%	Read or Relaxation or Personal Interest	72.3%
Cultural Performances	60.1%	Spectator Sports	71.3%
Local Outdoor Cafes	57.1%	Movies	67.9%
Spectator Sports	52,8%	Local Outdoor Cafes	61.2%
Festivals	36.1%	Festivals	45.6%
Casinos	31.3%	Aboriginal Cultural Activities	44.9%
Pick-your-own Farms	28.4%	Casinos	44.1%

Canadian	%	American	%
Recreational Dancing	24.9%	Recreational Dancing	32.0%
Aboriginal Cultural Activities	21.2%	French Canadian Cultural Experiences	24,5%
French Canadian Cultural Experiences	19.1%	Pick-your-own Farms	25.9%
Playing Chess or Backgammon	11.0%	Playing Chess or Backgammon	15.3%

Source' TAMS-Horticulture

D. Preliminary List of Potential Horticultural Attractions

The following is a preliminary list of attractions that was compiled from a variety of directors and marketing sources.

Region and site	Location	Description
Niagara – Hamilton & Area		
Centre for Canadian Historical Horticulture Studies	Hamilton	Botanical garden
Churchill Gardens	Hamilton	
Dundurn Castle	Hamilton	Castle and garden
Floral Clock and Lilac Gardens	Niagara Fall	
Gage Park	Hamilton	
Horticultural Experiment Station	Vineland	
Niagara College Arboretum and Greenhouse	St. Catharines	Arboreta and botanical gardens
Niagara Parks Botanical Gardens	Niagara Falls	
Niagara Parks Commission	Niagara Falls	Arboreta and botanical gardens
Niagara Under Glass	Beamsville	Greenhouse and educational tour:
Oakes Garden Theater	Niagara Falls	
Queen Victoria Theater	Niagara Fall	
Royal Botanical Gardens	Hamilton	Botanical garden
Sam Lawrence Park	Hamilton	
Vineland Research Station	Vineland	Arboreta and Botanical Gardens
Walker Botanic Garden	St. Catharines	Botanical garden
Richlyn Nurseries	Fergus	Botanical Exhibition Gardens, Ni. Garden Centre
Alexander Graham Bell Memorial and home	Brantford	
Country Lane Herbs and Dried Flowers	Puslinch	
Eastern Ontario		
Dominion Arboretum, Central Experimental Farm	Ottawa	Arboreta and botanical gardens
Garden of the Provinces	Ottawa	
Parliament Buildings and Peace Tower grounds	Ottawa	
Maplelawn Garden	Ottawa	
Burley's Gardening Pick Me Ups	Peterborough	
Rideau Hall	Ottawa	
Old Field Garden and Wildflower Nursery	Oxford Station	

Region and site	Location	Description
Sifton Botanical Bog	Oxford	Arboreta and botanical gardens
Greater Toronto Area		
Allan Gardens	Toronto	Botanical garden
Canadian Fern Society Hardy Fern Garden	Toronto	
Casa Lorna	Toronto	Garden and castle
China Court	Toronto	
Cullen Garden and Miniature Village	Whitby	
Edwards Garden	Toronto	Botanical garden and connecting pa
Erindale College Conservatory	Mississauga	Arboreta and Botanical Gardens
Guildwood Park	Toronto	
Humber College Arboretum	Rexdale	Botanical garden
James Gardens	Toronto	
Metro Toronto Parks Commission	Toronto	Arboreta and Botanical Gardens
Parkwood Estate	Oshawa	Mansion and gardens
Toronto Zoo	West Hill	Arboreta and Botanical Gardens
Richters Herbs	Goodwood	Greenhouse & Gift Shop
Spadina House	Toronto	
University of Toronto		
University of Toronto Arboretum	Toronto	Arboreta and Botanical Gardens
Victoria Gardens Cathedral Church of St. James	Toronto	
Wildflower Farm	Schomberg	Native flowers, cut flowers & dried flowers, pick your own
Brinkman Botanical Gardens	Schomberg	Private botanical garden
The Herbal Touch	Otterville	
Southwestern Ontario		
Arthur Meighan Gardens	Stratford	Garden
Ben Veldhuis Greenhouses	Dundas	
Centennial Gardens	Stratford	
Elmo W. Curtis Gardens	London	
Fanshawe Pioneer Village	London	
Jacee Gardens McKenzie Ross Park	Chatham	Arboreta and Botanical Gardens of America
Sherwood Fox Arboretum	London	Botanical Garden
Storybook Gardens and Springbank Park	London	
The Canning Gardens	Paris	
University of Guelph Arboretum	Guelph	Botanical Garden

Region and site	Location	Description
University of Western Ontario	London	
Victoria Park	London	
Colasanti Tropical Gardens & Petting Farm	Ruthven	Botanical garden
J. J. Neilson Arboretum	Ridgetown	Botanical garden
Northern Ontario		
Larkwhistle Garden	Miller Lake	Botanical Garden
Laurentian University Arboretum	Sudbury	Botanical garden
Great Lakes Forest Research Center Arboretum	Sault Ste. Marie	Arboreta and botanical gardens
Centennial Botanical Conservatory	Thunder Bay	Botanical garden
Hillcrest Park	Thunder Bay	
International Friendship Garden	Thunder Bay	Botanical garden
John W. Haggerty Arboretum	Thunder Bay	Arboreta and botanical gardens
Lakehead University Arboretum	Thunder Bay	Botanical garden
Lauber Arboretum	Kakabeka Falls	Botanical Garden

E Preliminary List of Horticultural Associations

The following is a list of horticultural and horticultural-related associations based in Ontario. This list is not meant to be all inclusive.

Canadian Horticultural Council, Ottawa	Organization promoting development of horticultural industry.
Landscape Canada, Milton	To represent ornamental horticultural nursery and landscape companies across Canada
Canadian Ornamental Plant Foundation, North Bay	To encourage new plant development by strengthening relations between growers and breeders for the benefit of the horticultural industry.
Gardens Clubs of Ontario, Grimsby	Coordinates activities of 14 Garden Clubs in Ontario
Ontario Horticultural Association, Sutton West	Recreation, Science and Nature
Ontario Rock Garden Society, Shelburne	To promote the study and cultivation of alpine and related garden plants, and the creation of rock gardens. Meet 10 times per year, spring and fall plant sales, seed exchanged, handbook listing members and gardens to visit, Member of North American Rock Garden Society
Royal Botanical Gardens, Hamilton	To be recognized in Canada and throughout the world for unique contribution to collection, research, exhibition and interpretation of the plant world and the development of public understanding and appreciation of the relationship between the plant world, humanity and the rest of nature.
Seeds of Diversity Canada, Toronto	To search out and preserve rare and endangered varieties of vegetables, fruits, flowers, herbs and grains. Magazine published 3 times per year.
Flowers Canada, Milton	Floriculture Industry
Canadian Gladiolus Society, Cobourg	
Canadian Horticultural Council, Ottawa	
Canadian Iris Society, Dunnville	

Canadian Rose Society,
Scarborough

Canadian Wildflower Society,
Markham

Rhododendron Society of Canada,
St George Brant

Southern Ontario Orchid Society,

Scarborough

Source: CIRC - Associations Canada, Canadian Almanac and Director)). 1998