

Gardens

Consumer Appeal

2021



Consumer Appeal of Gardens



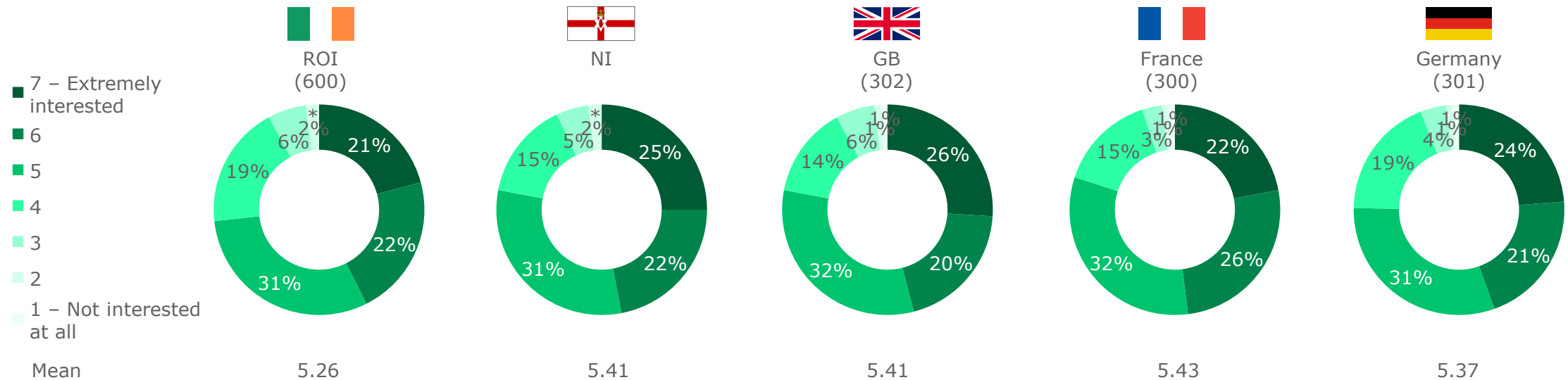
- 1.** Gardens fit perfectly for the growing trend of discovery, exploring and being **close to nature** and the outdoors. Well loved and appreciated more than ever right now.
- 2.** A **safe space** that supports socialising, freedom and being outdoors. They deliver a vast array of benefits that are readily accessed and appreciated.
- 3.** Front of mind is **peacefulness, calm and tranquillity**, stepping out of busy lives and having reflective moments highly desired.
- 4.** **Discovery** is high on the agenda, the ability to switch modes and tune into nature, engaging all your senses.
- 5.** Delivering surprise and the unexpected will **create delight** and enhance the experience e.g. secret trails, follies, tree top perspective
- 6.** Being in nature and the **positive impact** on mental health and wellbeing should not be underplayed.
- 7.** Having well curated, thought through **routes** is a must. Tell a story and tell it well.
- 8.** Delicate balance between too commercial and maintaining authentic cues, ultimately, it's the garden that needs to be the **hero**.
- 9.** **International audiences** will be harder to please, gardens are just one more attraction on their holiday list. They are highly influenced by digital (top ten's, best things to do etc..) and want authentic "Irish" cues.

Visitor Numbers to Gardens

Just under half of the core target express particularly strong interest in visiting gardens when on holiday. Solid interest across key segments but particularly amongst older, unconstrained adults.

Interest in visiting well known/historical gardens

(Base = total sample)








Q. On a scale of 7 to 1, where 7 is extremely interested and 1 is not interested at all, In general, how interested would you say you are in visiting well known/historical gardens when on a holiday, short break or a day trip?

Past visits to gardens tend to be at home 'day trip/short break' focussed, particularly for IOI and GB visitors. The French and Germans are somewhat more likely to include a visit when abroad.

When most likely to visit well known/historical gardens.

(Base = total sample)

	 ROI (A)	 NI (B)	 GB (C)	 FR (D)	 DE (E)
As a day trip/part of a day trip	33%	44%	44%	11%	28%
When on a short break holiday in my own country (1-3 nights)	35%	28%	29%	19%	21%
When on a short break holiday abroad (1-3 nights)	9%	12%	7%	21%	11%
When on a longer holiday in my own country (4+ nights)	9%	7%	13%	24%	15%
When on a longer holiday abroad (4+ nights)	15%	9%	7%	28% ▲ABC	26% ▲ABC



▲▼ Significantly above/below market norm to 95% confidence or above

Q. Thinking about visits you may have made to well known/historical gardens that are open to the public, which of the following best matches when you are most likely to have made such a visit?

Motivations for Visiting Gardens

Motivations for gardens are multi-faceted. Gardens offer so much more than just “relaxing”. It’s a break from routine, reconnection with nature and to reconnect with one’s inner self.

CENTRED – feeling whole

- Immersed in nature, healing power
- Thoughtful, beautiful sanctuary
- Gardens give you time back, “forces you to slow down”
- Lower tempo, different dynamic, “pause and be in the moment”
- Engaging all your senses
- Joy of nature, sense fully engaged
- Wellbeing – both physical and mental

RECHARGE – feeling better

- Peaceful, tranquil
- Visceral benefit – shoulders go down, stress literally lifts and melts away “getting away from the business of life”
- Break from routine
- Switch off, disconnect
- Relax, unwind, de-stress
- Time to renew & reflect

DISCOVERY – feeling enriched

- Sparks my imagination
- Surprise, delight – something new
- Exhilarating, “fires up your imagination”
- Inspired, motivated
- Awe – how do they do it?
- Unique, distinctive, diverse beauty
- Sensory overload in a good way
- Free imagination, “playful and magical”

RECONNECTION – feeling connected

- Thoughtful interactions
- Quality family time together, making memories
- Transgenerational – “something for everybody, lovely thing to do together, whatever age”
- Cues to nostalgia, feel close to people who have passed
- Safe reconnection – especially now!
- Reflects well on me, ‘good parenting’

Families have additional criteria that they take into account and put more emphasis on. Enhancing the health and wellbeing of children proves critical.

Motivations and family specific considerations.

- ✓ **Psychological, sensorial benefits** of being in nature - *get them off screens*
- ✓ Provides **exploration**, adventure, rambling – *unstructured play, using their imagination*
- ✓ Synonymous with “**safe freedom**”
- ✓ Passing on knowledge and **making great memories** – *brought up with it*
- ✓ Educational benefits appreciated, **interactive/immersive learning**
- ✓ Gardens are a go to with younger children, **embedded weekend routine**
- ✓ Essential activity to **blow off steam** and **get fresh air**
- ✓ **Typically a full, family day out** – *we get a walk, they get to play*

Appealing features:

- ✓ mazes, water, trails, trees, walled gardens, wild life, picnic areas,
- ✓ playgrounds, coffee shop – *essential bribery for the kids*



ACTIVE LEARNING, RE-ENERGIZED

I feel reenergized when I go to these places and the **kids get to run around and experience nature** - the smells, scents and the tactile side of things. Some places have sensory gardens. My young lad now tries to take slips of stuff. It's educational as well. **It is a great way for kids to learn** without having to be in a classroom.

Male, Dublin, Families 0-4.

**Visitors
appreciate
the feeling
of freedom
and choice
provided by
gardens**

The desire to
DISCOVER is
paramount

One wants to be
SURPRISED

There is a desire to
LEARN something new
about the CULTURE of
GARDENING

To see something that
is **BEAUTIFUL**



How Gardens differ from other tourists attractions:

- ❑ **It is a highly immersive and dynamic experience for the senses**, it's not only what you **see**, but also what you **hear** (the sounds of the birds, the sound of water) **smell**, you do not look AT the garden you are IN the garden and as such it's not just seeing & observing it's **experiencing** the garden. Gardens change throughout the seasons, through the day... the impressions are never (exactly) the same.
- ❑ An **intensely personal experience**
- ❑ A **garden visit can be enjoyed in multiple ways, you have the freedom to do it your way**. You can visit a garden at you own pace, and do what you are interested in; from studying every plant, to leisurely strolling around or just sit down and enjoy the scenery. You could cycle, boat, picnic, lie down in the grass... Gardens are interesting at any age, as the visit can be **adapted to the visitor's profile and desires**.
- ❑ **A garden visit, as a typical outdoors attraction, is a welcome break** from visiting monuments, museums etc.
- ❑ **Relaxing elements chime**; Being around nature, plants, trees, flowers,- as opposed to concrete, allows people to breathe; it' a welcome escape from the city and potentially busy holiday agenda.
- ❑ Gardens help us **step into another world**. They transport us and inspire delight, awe and wonder.

Gardens have gained even more appeal due to Covid but their appeal stretches far beyond that! Outlet for 'safe' but stunning socialising, facilitates reconnection and authentic moments with intensely personal experiences.

Heuristics associated with garden attractions, exceptionally positive mental cues

1. Ultimate switch off

Recharge, recalibrate, 'me time' Psychological break from routine.

Changes your mood for the good, keeps me going, therapeutic.

4. Positive reflection

Great childhood memories, family passions passed on.

Brings me back to my childhood. Reminds me of my Dad, feel close to him.

2. Genuine connection

Enjoying quality together time. Real conversations, making memories.

You are in the moment, enjoying it together. Proper catch up.

5. Imagination on fire

Fresh perspective, creative artistic elements transport.

Love imagining the story of the garden. Every stone tells a story.

3. Natural outdoors beauty

Freedom, escape. Dwell time, flip the switch, totally immersed. Seasonal aspect.

Crave the outdoors, now more than ever. Gentle way to spend the day.

6. Educational

Inspires, appreciate the effort Active learning for children. History with a new lens.

What can I learn and bring home to my garden? Learning why they have chosen to put plants together.

WELLBEING BEAUTIFUL FREEDOM
INSPIRATION PEACEFUL JOY
EDUCATION
PEACEFUL
EXCITEMENT ESCAPE EXPLORATION
NOSTALGIA

Gardens: What the Consumer Needs and Wants

Front of mind garden associations are clear, important to get these right to generate mental availability. Stand out features common across markets.

Flora and fauna – variety



Explosions of colour - breath-taking



Curiosities - unique



Water - calming



Topiary - clever



Old Walled Gardens



Note: Unconstrained younger and older memory structures also rooted in historic houses

What Drives Consumers to Gardens:

UNIQUE FEATURES:

- Create standout and are highly memorable.
- Small elements make a big impact
- Thoughtful distinctive features add hugely to overall appeal and drive repeat visits.
- Wow factor is alive and well.



(Glasshouses, giant trees, fairy trail, birds of prey, interpretative sculptures, walled garden, sunken grass, lake, plants, pagodas, maze, veg growing, bell tower, tropical walled garden, biodiversity, pollinators, butterflies)

LOCAL ACCESSIBILITY:

- Fortunate to have access to local gardens and parks
- Frequently visited
- Seeing the change in seasons maintains interest.



(Walled garden, birds, roses and rose week, seasonal changes, river, ducks, swans, fruit picking, forest, waterfall, red squirrels, fountain, classical gardens, train, natural play area)

SCALE:

- Larger gardens can provide mini magic in different areas
- expect it to be very well curated.
- Strong anticipation of diversity, which is typically very well delivered



(Waterfall, epic views, river, tropical aspect, hidden spaces, maze, bridges, well planned, surprises around every corner, greenhouses, bee hotels, gardening tips & hints, nooks and crannies, water, interactive, quizzes, facts, sensorial, trail, playground)

Spectacular gardens achieve strong stand out and prove breath-taking, distinctive, memorable and special.



Key components that provide Delight and Surprise in a garden

1. Woodland, sensory garden



2. Night time lights



3. On trend e.g. biodiversity, eco creds, GIY, vegan



4. Share the knowledge



5. Natural play opportunities – maze, logs, trails



6. Wildlife – aviary, bird hide, bug hotel, deer, squirrels



7. Food options, extend my day, local produce preferred



8. Nooks, crannies, alcoves – surprise around every corner



Plus don't forget the practical supports that make for a seamless garden experience.

8 practical areas to make for a smooth customer experience

1. Toilets – clean, numerous



2. Comfortable picnic area



3. Information & signage



4. Areas to be alone



5. Clear plan, route



6. Kids Zone for interactive fun



7. Refreshing pit stops



8. Keep it real, not crowded



Planning goes across the spectrum - spur of the moment and thoughtful. Popular sources are evident, having a strong digital presence is vital with appealing up to date photographs and “real” reviews.



Google- reviews and maps
Trip Advisor
Instagram
Facebook groups
What's App groups
Dublin city mum
Get away with the kids.ie
Discover NI



National Trust website
RHS (interactive map +)
Guidebooks - Dorling Kindersley
Leaflets (hotels/garden centres)
Magazines e.g. Gardener's World (2 for 1 vouchers)
TV & Movies (The Big Flower Fight, Crazy Rich Asians)
Merlin Passes



Family and friends
Avid gardeners
Celebrity endorsement e.g. award winning at shows, used as backdrop on TV programme
If Ireland – typically ask people I know who love gardens and are likely to have good advice

GOOGLE IT FIRST.....

Search google for the top things to do in the area, esp. if abroad

led by Instagram for my day trips, trip advisor is my go to,

Google it, then look up on Instagram tags, can see what it really looks like and see what the unique features are

Google is so informative but I think with Facebook it gives you first-hand opinions of people and photographs

Google map so you can see where you are and what's around and you can set a radius

Note: Family with younger children find it essential to plan in advance whether for a day trip or longer break.

**Know before you go:
FAQ's of a practical nature that will help inform choice and influence. Essential to tick the boxes on these common queries and information needs.**

FAQ's

- ✓ Amenities e.g. toilets, baby changing, coffee shop?
- ✓ Distance / travel time?
- ✓ Size of garden? Type of gardens?
- ✓ Flat or rough terrain?
- ✓ Accessibility for less mobile? And pushchairs?
- ✓ Child friendly? What ages? Play area?
- ✓ Space to run? Secure spaces?
- ✓ Length of walks?
- ✓ Parking? Fee?
- ✓ Co-located attractions?
- ✓ Cost of entry?
- ✓ Is it dog friendly?
- ✓ Scented garden for visually impaired?

Gardens: Check List

Gardens Check List:

What consumers expect: Hygiene Factors

- ✓ Coffee shop
- ✓ Toilets
- ✓ Baby-changing
- ✓ Parking
- ✓ Picnic Areas
- ✓ Refreshing pit-stops
- ✓ Signage
- ✓ Maps
- ✓ Length of walks
- ✓ Plant labelling
- ✓ Weather proofed (enclosed outdoor areas / shelters)
- ✓ Digital (app for deep-dive)
- ✓ Online Presence (FAQ / testimonials / reviews)
- ✓ Pricing – loyalty / discounts

What consumers are looking for: Discovery & Surprise

- ✓ Range of garden types
- ✓ Unique features (sculptures / fairy trails)
- ✓ Woodland, sensory garden
- ✓ Night-time entertainment (lights / tours / opera)
- ✓ On-trend (Bio-diversity, eco, GIY, Vegan)
- ✓ Share the knowledge (on-site gardeners / classes)
- ✓ Natural play opportunities (maze, logs, trails – away from manicured / peaceful areas)
- ✓ Wildlife – aviary, bird hide, bug hotel, deer, squirrels)
- ✓ Follies, nooks, crannies, alcoves – surprise around every corner
- ✓ Hero water features (rivers / fountains / ponds / wells)
- ✓ Return to nature -Rewilding programme
- ✓ Access all areas (greenhouse / historic house / gardeners)
- ✓ Markets (local producers / artists)
- ✓ Rota of events (enticing for locals / repeats)

Gardens – Top of mind associations*

- ✓ Variety of flora and fauna
- ✓ Explosion of colour
- ✓ Curiosities - Unique
- ✓ Water – calming
- ✓ Topiary – clever
- ✓ Old wall gardens

*(Important to get these right both physically and in communications to generate mental availability)

* Ensure imagery is diverse and covers all seasons of the garden