

**Evidence from the British Association of Landscape Industries (BALI) to the Digital, Culture, Media and Sport
Select Committee Inquiry into Garden Tourism – May 2019**

1. Established in 1972, the British Association of Landscape Industries (BALI) promotes, supports and inspires over 900 Registered members including landscape contractors, landscape architects, garden designers and suppliers to be leaders of an environmentally, ethically and commercially sustainable landscape services industry. With over 1,800 members in total, including qualified training providers and students studying horticulture and landscape related qualifications, our professionals carry out a variety of landscaping works including garden design, landscape construction and grounds maintenance, as well as interior installation, maintenance and the supply of quality landscaping materials.

BALI wish to highlight the following points for consideration by the committee:

- UK parks and gardens represent an important destination for both international and domestic tourists. One third of all international tourist visits in 2017 featured at least one visit to a park or garden
- Despite the popularity of parks and gardens, and importance to the UK economy, they are facing existential pressures including lack of budget, shortage of staff and uncertainties concerning their long-term role
- If the UK economy is to continue benefitting from parks and gardens as a tourist destination, a long-term strategy of investment must be implemented, which ensures parks and gardens are able to support the growing numbers of domestic and international visitors

How can gardens across the UK be supported to attract visitors and to ensure their future sustainability?

2. The Oxford dictionary defines a visitor as ‘a person visiting someone or somewhere, especially socially or as a tourist’. Someone who chooses to visit a park, garden or area of greenspace in the UK may be doing so for reasons including:
 - Domestic or overseas tourist
 - Sports activities (formal and informal)
 - Passive visitors (i.e. those who observe the park from a distance)
 - Dog walkers
 - Children seeking play areas
3. The research undertaken by VisitBritain identifies parks and gardens as one category. For the purposes of this evidence submission, the term ‘garden’ will be extended to include the following types of private and public greenspace:
 - Public parks
 - RHS Gardens
 - Botanic gardens
 - Open space



4. Whilst the demand for parks, gardens and greenspaces is likely to increase, many are facing pressures so serious that their future sustainability is threatened. The distribution of these pressures is not equal; parks, gardens and greenspace in the public realm are likely to face more of these pressures than those owned and funded by private sources. Many of these pressures are universal, and additional support is required to ensure parks, gardens and greenspaces in the UK continue to draw domestic and foreign visitors.
5. Arguably the most important threat to the sustainability of parks, gardens and green spaces is a lack of budget. Research by the Heritage Lottery Fund in 2016 suggests parks managers have widely forecasted decreases in budgets between 2017 and 2019. The result of the revenue cuts is a decline in park quality, decline in skilled labour teams, and reduced support to user groups and staffing of events.
6. Regardless of the reason for this decline in park maintenance budgets, this trend must be reversed. If parks are to continue playing an important role for any user group, provision must be made for revenue streams to support purchasing of products and materials, and recruitment of skilled workers, who can undertake high quality construction and maintenance work.
7. A wider problem of acquiring skilled horticultural staff exists in this country. The number of individuals equipped with the skills necessary to perform maintenance and construction tasks on a high-profile park, garden or greenspace is low. There is a deficit in horticultural skills in this country which must be addressed.
8. Through it's GoLandscape initiative, BALI has worked with schools, colleges and the industry to raise the profile as horticulture and landscaping as a valid career choice with prospects. Despite the initiative, between 2017 and 2018, just 1,590 individuals started a horticulture or landscape-based apprenticeship. This figure is too low to fill the number of jobs currently open, and without skilled operatives the quality of parks, gardens and open spaces will decline. Unfortunately, just 8% of this figure represents females who have undertaken apprenticeships; again, more must be done to encourage greater diversity in the industry.
9. More must be done to ensure the UK is equipped with an employment pool to sustain green destinations. Landscape and horticulture must be championed as desirable, skilled professions, which individuals aspire to be involved in. In order to do this, it must be recognised by employers – and the government – as a valuable career choice with opportunity. Continual budget cuts to public open spaces resulting in fewer available jobs and a focus on cost-cutting is unlikely to attract individuals seeking a long-term profession. Similarly, low wages driven by low budgets are unlikely to attract candidates to the industry who have skills, qualifications or experience.
10. Whilst community involvement is to be applauded as a way of ensuring parks retain an adequate level of care, this approach may hide the true nature of funding short-falls and erode the professionalism of the landscape and horticulture industry. Whilst the horticulture and landscape sector attract a

passionate, skilled community, willing to give time on a voluntary basis, it is important also to value the skills, experience and equipment the professional landscape industry is able to provide.

11. In the absence of budgets that can support adequate maintenance standards, external sources of funding may be pursued providing the overall aims of the venue are retained. Parks, gardens and greenspace have the potential to include all users through events sports and community events which may be tailored to a catchment. The role of a park or garden may change in the long-term as a result of pressures from visitors or the local environment.

What contribution do gardens and garden design make to domestic and international tourism?

12. As highlighted in research conducted by VisitBritain, parks and gardens attract tourists, with overseas visitors more likely to visit a park or garden than a museum or art gallery. 42% of overseas visitors to London spent time in a park or garden.
13. Research conducted by the Heritage Lottery Fund in 2016 for their *State of UK Public Parks* report suggests the number of domestic visitors to parks is also high; more than half the UK - 57% - visit parks local to where they live once a month. In urban areas this figure increases to 61%, and 90% of households with children under the age of 5 visit their local park at least once a month.
14. The frequency of park use is likely to rise. Research carried out by Natural England as part of their 'Monitor or Engagement with the Natural Environment' survey highlights visits to parks have become increasingly popular.
15. In 2018, BALI, together with the other members of the Ornamental Horticulture Roundtable Group, funded a report by Oxford Economics to assess the economic impact of ornamental horticulture in the UK.
16. Modelling carried out as part of this report suggests that in 2017, the UK saw around £2.9 billion worth of tourism spending that was attributable to parks and gardens, with 1 in 3 of all international tourist visits to the UK involving at least one trip to a park or garden.. International visitors to the UK accounted for over three-quarters (76 percent) of this total spend, and their £2.2 billion annual expenditure is "additional" to the UK economy. The remaining £690 million was accounted for by domestic (intra-UK) visits, including holidays that involved overnight stays, as well as day trips.
17. The report estimates that in 2017, the visitor spending directly attributable to parks and gardens resulted in a £1.2 billion contribution to GDP from tourism industries including accommodation, food services, transportation, retailers, sports and the creative & cultural industries. This direct GDP impact was associated with 32,000 jobs and around £265 million in tax revenues in 2017.

18. Review of wider industries required to deliver these services, suggests a higher figure of £2.9 billion was supported by tourism activity attributable to UK park and garden visits in 2017. This wider scale of economic activity was enabled by approximately 60,500 workers and gave rise to £724 million in tax revenues for the Exchequer.

How do gardens and garden design contribute to the creative economy?

19. Research carried out by Oxford Economics for their report into the economic impact of ornamental horticulture in the UK included investigation into the value of landscape services and wider contribution to the economy. Landscape services incorporate the design of domestic gardens, commercial spaces and public parks.
20. The term design includes expertise in all aspects of landscape design works, as well as associated specialist design services such as lighting, irrigation, computer aided imagery and development.
21. Estimates suggest a total of 196,300 workers helped deliver landscape services across the UK in 2017. This figure includes 72,600 workers across 18,300 registered landscaping firms, as well as those involved in non-landscaping (and non-creative occupations). It is estimated a further 67,200 people work within the creative landscape services sector, but are un-registered, and likely to be represented by smaller-scale businesses. In addition, it is estimated a proportion of the additional 56,600 people who work in landscape-focussed roles within other industries would fulfil creative roles directly related to the landscape industry.
22. Collectively, landscaping activities carried out by workers directly supported an estimated £6.8 billion contribution to UK GDP in 2017 – equivalent to 0.3% of UK GDP in that year. The UK's reputation as a leading horticultural centre helps to generate considerable international demand for its garden designers, landscape architects and consultants. While this demand is exemplified in some very significant and high-profile landscape projects around the world, it has not been possible to measure the extent of these exports using official statistics.
23. Taxes on the profits, purchases and premises of landscape service firms totalled an estimated £130 million in 2017. The labour taxes chargeable on these firms' employment amounted to a further £531 million; while the income taxes and NICs of landscape workers in other sectors of the economy reached an estimated £220 million.

How can garden design and landscaping best support community spaces and community connections?

24. Together with management that responds to the changing needs of the local community, garden design and landscaping can ensure the needs of different user groups are delivered efficiently and sustainably.



25. As an increasing proportion of the UK population live in urban areas, reliance on parks, gardens and greenspaces for a variety of functions is likely to increase. Design can ensure the spaces which serve local populations and, depending on the area, tourists, are able to support high volumes of people. Design can be used to allow a wide variety of user groups access to areas and, with good management, ensure spaces are able to resist pressure from high use.

26. Community spaces may serve the following roles:

- Play facilities
- Allotments
- Habitat areas
- Events
- Opportunities for community involvement

Involving design professionals at an early stage ensures the needs of users are catered for.