Gardens and Tourism

Business Insights Series 2011/2012

March 2012



GARDENS AND TOURISM

1.	Introduction	2
2.	Setting the scene	2
З.	The popularity of NI gardens	3
4.	<i>The popularity of NI gardens What the visitor wants</i>	5
5.	What the visitor gets	7
6.	Views from overseas markets	8
7.	International best practice case	9
8.	Our current positio	. 10
9.	A few suggestions	. 11
10.	Conclusion	. 12
<i>11.</i>	Sources	13

1. Introduction

This article examines the garden tourism market, its size and sub-sectors, and makes recommendations for tourism operators wishing to carve out a share of the market.

Garden tourism can include a wide variety of activities including garden tours, garden festivals and special garden events. NI has many well-established gardens however the gardens tourism market has not had the high profile enjoyed by other outdoor activities. This report takes into account the wide range of gardens on offer, from National Trust gardens to private owned gardens in NI. It will examine how to maximise the potential of these in a tourism context.

2. Setting the scene

Gardening is a popular outdoor hobby but in recent years, the scope of this outdoor activity has expanded. People are now travelling to visit gardens in other towns, counties and countries. With everything from stately homes with impressive gardens to smaller domestic gardens, NI's offerings are already a longestablished attraction for locals. However, the growing popularity and publicity of international exhibitions is resulting in garden tourism establishing itself as a popular holiday activity. For example, in 2010, tickets to the Chelsea Flower Show sold out in record time and tickets to the 2011 event sold at five times their face value (The Telegraph, 2011).

Despite the recession affecting almost every aspect of society, the National Trust announced record target visitor numbers to their properties for their financial year 2011/2012, based on increasing numbers in 2011. Given that a significant number of their properties are gardens; this is positive news for the wider UK gardens tourism market. The National Trust expects visitor numbers to exceed 18m for the entire UK, a figure never before witnessed by the organisation. Visitor figures reached 16.8m for 2010/2011, an increase of 7% on the previous year. However, not only have visitor figures increased, retail sales figures also increased by 8%, whereas catering figures jumped by 14% (National Trust, 2011).

NI has many varied gardens open to the public throughout the year. From the public Botanic Gardens in Belfast City to the privately owned gardens of Ballyrobert Cottage in Antrim, there is something for everyone in NI gardens. Events and festivals throughout the year ensure that each time a visitor comes to NI, there is always plenty for them to see in the gardens. Indeed, 2011 research figures from Mintel show that 54% of domestic visitors believe that NI has a wide range of gardens open to the public.

3. The popularity of NI gardens

NI has a strong horticultural history. The region has been successfully breeding different varieties of roses since the late 19th century. For example, the world's oldest rose breeding family can be found in NI - the Dicksons of Newtownards have been breeding roses for 6 generations.

Coupled with a climate that is particularly suitable to gardening, NI has proven itself to be a place where plants from many parts of the world can be successfully cultivated. The Sea Plantation on the banks of Strangford Lough has provided Mount Stewart with a micro-climate where many varieties of exotic plants can be cultivated. Lady Londonderry, creator of Mount Stewart gardens, successfully grew plants originating from regions including Asia, North America and the southern hemisphere. This garden, along with many others in NI, has consistently attracted strong visitor numbers from the local NI area but also from the Republic of Ireland (RoI) and abroad.

As demonstrated in the chart below, garden tourism has continued to perform well in recent years. Despite the overall numbers of overseas visitors to NI drop significantly since 2008, visitors to gardens have held strong.

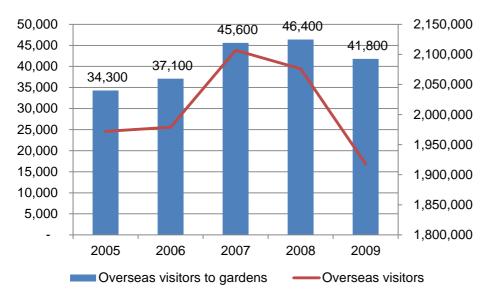


FIGURE 1: OVERSEAS VISITORS TO NI AND NI GARDENS, 2005-09

SOURCE: MINTEL/NITB

In 2008, 46,400 overseas tourists visited gardens in NI. In 2009, this figure dropped slightly by 4,600. Overseas visitors to NI gardens outperformed the overall tourism market in 2008. The figure increased by 2%, while the market for tourism decreased by 1%. This demonstrates that, despite a drop in foreign visitor numbers, garden tourism is successfully maintaining its level of attraction for visitors to the NI region. In 2009 overseas visits to NI gardens fell broadly in line with the overall decrease in total overseas visitor numbers. Tourism Ireland is predicting a significant increase in tourism to NI in 2012 due to the launch of the Titanic Belfast visitor attraction. It can be expected that visits to gardens will increase as the market for overseas tourism to NI recovers.

The popularity of garden tourism in NI could be due to the range and quality of gardens open to the public. With offerings from the world's oldest rose breeding family to water gardens to medieval physic gardens, NI has an impressive range of quality gardens to be seen throughout the region. Carnfunnock Country Park offers a wide range of gardens including a butterfly garden and a water garden while Grey Abbey offers a reconstruction of a medieval physic garden. Physic gardens were used in medieval Ireland to grow plants used in the treatment of illnesses and were considered to be significant assets to monasteries during this era.

When it came to visiting these gardens, research showed that 19.7% of NI tourists had visited gardens in NI in the past 12 months. For GB and RoI visitors, this figure stands at 7.4% and 3.8% respectively (Mintel 2011).

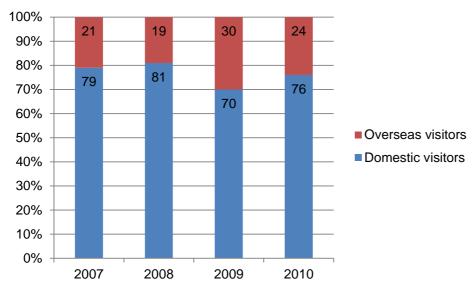


FIGURE 2: DOMESTIC VS OVERSEAS VISITORS TO NI GARDENS 2007-2010

SOURCE: MINTEL/NITB

NITB research, displayed in the chart above clearly shows that NI gardens have a strong domestic visitor base. 2009 saw the highest number of foreign visitors to NI with 30% of NI garden visitors being from abroad. This figure dropped by 6% in 2010 which was in accordance with the overall drop in foreign tourist figures to NI.

Of the figures released by various gardens across NI, the Botanical Gardens in Belfast have had the highest visitor numbers. Between 2007 and 2011, visitor numbers to the Botanical Gardens have averaged at nearly 670,000 per annum. The chart below displays visitor numbers for other popular gardens in NI.

FIGURE 3: VISITOR NUMBERS FOR GARDENS 2007-2010

	2007	2008	2009	2010	2011
Botanic Gardens Belfast	660,000	660,000	700,000	679,000	650,000
Mount Stewart House and Gardens	128,000	133,452	122,884	150,000	150,517
Castle Ward House and Demense	62,301	57,336	80,000	103,322	126,006
Tannaghmore, County Armagh	N/A	80,000	85,000	85,000	N/A
Joey Dunlop Memorial, County Antrim	76,500	80,000	80,000	80,000	12,000
Florencecourt House & Gardens	30,664	30,000	32,813	38,505	40,314
Grovelands, Belfast	4,600	5,000	N/A	23,000	N/A

SOURCE: MINTEL/DETINI

The trends outlined in this section highlight that there is an attractive market for garden tourism in NI. The next section of the report will explore what the visitor wants and expects from gardens in NI.

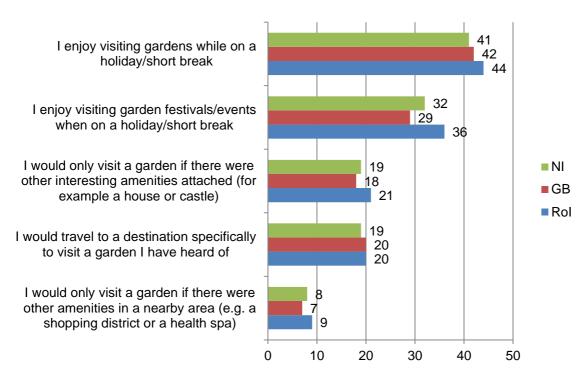
4. What the visitor wants

A survey was commissioned for NITB to explore tourist's attitudes toward gardens. This section explores how NI, Great Britain (GB) and RoI consumers view gardens as a holiday activity for destinations that they choose to visit. Overall, NI, GB and RoI visitors to NI gardens have similar ideas in terms of what they are looking for when visiting a garden.

Consumer research carried out by Mintel revealed that over half (54%) of NI residents believe that NI has a wide range of gardens open to the public. Approximately one quarter of GB and RoI residents believe the same (24% and 25% respectively).

Results from the same research showed that the most common type of break to take in NI was with a partner/spouse, with family parties coming in second. According to Mintel's findings, the main reason for people to visit NI was "to relax, escape, chill out and recharge their batteries". This indicates that garden tourism is a key activity in which consumers would be interested in pursing and should be a prime consideration for tourism operators to target this market.

FIGURE 4: CONSUMERS ATTITUDES TO GARDENS, NI, GB AND ROI, 2011



SOURCE: MINTEL/TOLUNA

The chart above details the main NI, RoI and GB consumer attitudes to gardens in NI. As can be seen above, a significant proportion of visitors to NI enjoy attending a garden festival or event when on a holiday or short break. The many garden festivals and events are therefore a valued addition to the overall garden tourism industry in NI.

Although gardens are enjoyed by 41% of NI consumers, it seems the dedicated following of visitors is much smaller. Only 19% of NI consumers and 20% of RoI and GB consumers agreed in 2011 that they would travel to a destination specifically to visit a garden they have heard of. This figure is lagging behind those who casually enjoy visiting gardens while on a holiday or a short break.

Another interesting finding from the survey was the necessity of "interesting amenities" attached to gardens. Some 21% of RoI respondents said they would only visit gardens if there was another amenity to be seen there also (for example, a house or castle). Some 19% of NI and 18% of GB respondents shared a similar sentiment in 2011. Although not every garden in NI can provide amenities such as castles or houses, it could be an option for those in close proximity to them to look into co-promotion techniques to optimise tourism potential for both properties. When it comes to other types of amenities, such as shopping centres or health spa's, visitors do not put such an importance on them. With less than 10% of all respondents stating other amenities were influential in attracting them to gardens, it is clear that high quality gardens are appealing to visitors in their own right.

As garden tourism is a very relaxing activity, and taking into account that over 40% of NI, GB and RoI visitors enjoy visiting gardens while on a holiday or a short break, it is clear there is potentially a very strong market to tap into for garden tourism in NI.

An age profile of NI garden visitors has been set out in the chart below. What is clearly demonstrated is the popularity of garden tourism among older adults. The 55+ age group is most likely to enjoy visiting gardens while on a holiday/short break.

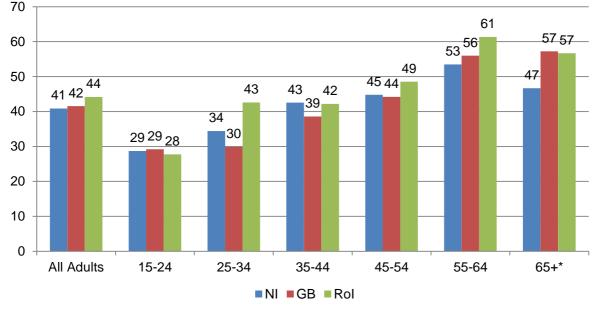


FIGURE 5 CONSUMERS RESPONSE TO THE STATEMENT "I ENJOY VISITING GARDENS WHILE ON A HOLIDAY/SHORT BREAK", NI, GB AND ROI, 2011

SOURCE: MINTEL/TOLUNA * NOTE: SMALL SAMPLE SIZE FOR 65+ DEMOGRAPHIC

This finding can be used by those interested in promoting garden tourism by specifically targeting those more likely to visit gardens while on holiday. The 55+ age group is a lucrative market as they generally have more disposable income available to them and are also more likely to be time rich. In comparison to the 25-34 and 35-44 age groups, their children are already grown up and are normally no longer dependent on their parents. This leaves the 55+ age group with more money for discretionary expenditure and with more time to concentrate on their hobbies.

Another interesting finding from this research was the breakdown of male/female preferences for garden tourism. Women have a stronger preference for visiting gardens while on holidays when compared to men. Some 47% of NI female respondents stated they enjoyed visiting gardens while on holidays, compared to 34% of men. With respect to GB and RoI respondents, 47% and 50% (respectively) of female respondents enjoyed visiting gardens whereas, for men, these figures stood at 36% and 38% respectively. As many outdoor activities are male-dominated, such as golf or sporting events, garden tourism does a lot to attract female visitors and therefore helps to balance the market.

Women in NI are slightly less likely than men to need other amenities attached to gardens in NI for them to visit gardens. Some 18% of NI women agree with this whereas 20% of men are in agreement. For RoI and GB respondents, men were less likely to require amenities to visit gardens. 22% and 20% of RoI and GB women, respectively, said they would visit gardens if they had amenities whereas the results for men stood at 20% and 17%.

The next section deals with what the NI garden visitor can expect to get when visiting gardens in NI.

5. What the visitor gets

Visitors to gardens in NI are positive about the range of gardens open to the public and their respective amenities. The chart below shows what visitors value most in terms of garden tourism experiences.

FIGURE 6: VISITOR ATTITUDES TO NI GARDENS, NI, GB AND ROI, 2011

	NI	GB	RoI
	%	%	%
Northern Ireland has a wide range of gardens open to the public Tea shops/restaurants are important when visiting gardens Picnic areas are important when visiting a garden I like to visit the gardens that Northern Ireland has to offer Gardens are great places for family days out I prefer forest/country parks to designed gardens I enjoy visiting gardens that have other tourist facilities - house, guided tours, museum/exhibition etc.	54 53 46 37 35 33 25	24 27 20 18 23 18 16	25 37 31 22 29 27 26
I enjoy visiting gardens but have little interest in botany/horticulture	23	15	19
I like to visit a garden festival/show in Northern Ireland	22	14	12
Northern Ireland gardens are unique/inspiring	21	11	7
Gardens are the best places to go walking	12	11	14
None of the above	7	22	21

SOURCE: NITB

What impacts the most, in the chart above, is the importance of having tea shops or restaurants on site or close by when visiting gardens. This is particularly important for NI visitors with 53% in agreement. However, for RoI and GB respondents the figures are significantly lower at 37% and 27% respectively. It is true to say, however, that garden tourism is a peaceful, relaxing activity and tea shops/restaurants allow the tourist the time to fully appreciate their surroundings.

The popularity of gardens as a destination for family days is relatively high across NI, RoI and GB respondents. The importance of having picnic areas available for visitors is particularly high for NI visitors with 46% stating it was important. Its importance for RoI and GB visitors is less however, with figures standing at 31% and 20% respectively.

Gardens are seen as great places for family days out. With 35% of NI respondents and 23% and 29% of GB and RoI respondents agreeing with this statement, it shows that there is a significant potential for gardens to capitalise on this opportunity. Child friendly facilities and activities and perhaps family passes would be ideal in drawing more families to spend their free time visiting gardens.

Although 37% of NI visitors like to visit gardens in NI, only 21% find them to be unique and/or inspiring. The trend is similar among RoI and GB respondents. 22% of RoI respondents like to visit NI gardens, this figure stands at 18% among GB visitors. When it comes to finding them unique or inspiring, 7% of RoI and 11% of GB visitors agreed.

Results from the survey also showed that some garden visitors had little interest in horticulture however enjoyed visiting gardens. This market can also be effectively targeted by NI gardens by expanding visitor activities. Ideas and examples of how to target this market are explored later in the report.

The survey also showed that gardens face some stiff competition from forests and country parks. Some 33% of NI, 27% of RoI and 18% of GB stated they preferred forests and country parks to designed gardens. Also, it is clear from this research that gardens are not the preferred location for taking walks. Relatively low agreement with this statement (12% NI, 14% RoI, 11% GB) shows that gardens have the scope to increase their appeal to those who enjoy walking.

6. Views from overseas markets

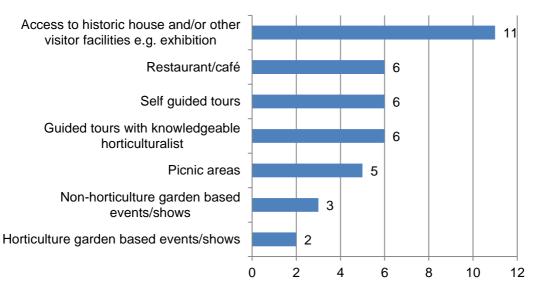
2012 Research carried out by Tourism Ireland Ltd (TI Ltd) across various international markets has shown that the tourism market for gardens in NI has significant potential.

When asked if there was an interest in garden tourism in specific markets, respondents from Belgium, Austria, Switzerland, Australia, New Zealand and Canada were most likely to agree that there was. Representatives of Japan noted that although garden tourism was popular, it was not as popular as World Heritage sites. Italians and Spaniards enjoy gardens but only as part of a varied itinerary. The Chinese market seems to have a low interest in garden tourism.

Of the markets that have an interest in garden tourism, many key segments were identified in creating demand for this type of tourism. Australia described the key segment as empty-nesters and sightseers. For the Japanese, the interest mainly comes from senior citizens with a higher proportion of females taking an interest. Austria also described the over 60's as their key segment. The Swiss visitor is interested in outdoor activities so gardens are an excellent option for them. The Italian, New Zealand and Canadian markets all defined their key segments as sightseers.

Representatives of each market were asked which features they felt were most important when visiting gardens. The results have been mapped out in the chart below.

Figure 7: Preferences in your market for garden tourism features (number of responses), 2012



SOURCE: MINTEL/TOURISM IRELAND

As can be seen from the previous chart, access to houses and other visitor amenities is regarded as very important in terms of the foreign tourist. Also of significant value to foreign visitors to gardens are restaurant/café amenities. The availability of guided and self guided tours of gardens is also important. A special consideration for self-guided tours would be the availability of guide material in foreign languages so that tourists can get the most out of tours. Of lesser importance to the foreign tourist is the availability of horticultural and non-horticultural based events. This is likely due to time constraints as foreign tourists try to pack in as much as they can into their holidays.

When asked to consider the value of Garden Trails including itineraries and packages to multiple gardens in a single visit, the majority of respondents felt that this could be a positive step in promoting NI gardens to foreign tourists. They felt that offering this information on websites and to journalists who can then promote it separately would help to increase the profile of NI gardens abroad.

The vast majority of TI Ltd's representatives agreed that demand for tourism from special interest horticultural/gardening groups was low and too specific a market to target. Respondents felt that the ideal method for targeting garden tourism was to include gardens in a broad itinerary of the region.

Tour operators that include gardens in their packages seem to concentrate more on gardens in RoI as opposed to the NI region. Gardens like Powerscourt in Co. Wicklow and Muckross House and Gardens in Co. Kerry have features on tour itineraries but it is not evident that tour operators are including NI gardens in their tour offerings.

It seems that, even on an international scale, best practice garden tourism is something that needs to be developed. When asked whether any best practice garden tourism examples could be identified and used as a benchmark for the NI industry, the vast majority of respondents said they were not aware of such a feature in their region. The Austrian market hosts "Die Garten Tulln" every year just outside of Vienna. In 2011, almost 95,000 visitors attended this horticultural show set on 50 hectares, which boasts a huge display of gardens for the garden enthusiast to recreate at home.

When asked what they felt NI's product development focus should be with respect to the garden tourism market, a large amount of overseas respondents felt that making more information available and more advertising would be a significant boost to the area. Garden Trails, linking gardens to historic houses in the vicinity and special admission passes were also suggested as possible areas to look at. Special admission passes could be introduced to allow foreign tourist entry to various gardens in a single day, particularly advantageous for a Garden Trail, to entice further visits.

Another important recommendation was having all material available in various foreign languages so that the foreign tourist feels comfortable and does not experience any language barriers while visiting the area.

The next section investigates international best practise cases, what challenges were experienced and how these challenges have been overcome.

7. International Best Practice Case

7.1 Carlow Garden Trail, RoI

Carlow's Garden Trail is one of the most developed Garden Trails in the South-East of Ireland. Officially launched in April 2008, the Garden Trail has gone from strength to strength in developing its status as one of the best Garden Trails in Ireland.

Carlow Tourism, Fáilte Ireland and Carlow Councty Council were the parties involved in setting up this Garden Trail. Both Carlow Tourism and Fáilte Ireland were involved in the setting up of the trail and the marketing aspects whereas Carlow Council facilitated an excellent road signage system. The trail can be taken in a clockwise or anti-clockwise direction but Eileen O' Rourke of Carlow Tourism has stated that, for gardens and visitors alike, the effective road signage network has been of huge benefit.

When planning the garden trail, it was imperative that the gardens chosen would be of significant interest to garden enthusiasts. Carlow Tourism believed that those who take garden trails are gardening enthusiasts and take a special interested in what plants or flowers can be seen at particular gardens. In order to ensure the most appropriate gardens were chosen, they requested the help of garden expert Finola Reid. All potential gardens were evaluated for inclusion in the trial and only those considered most appropriate were chosen. As of 2012 the trail boasts 16 gardens in total.

Launched by celebrity Kathryn Thomas, the Garden Trail received a lot of publicity and free advertising around its opening. Covered by local and national newspapers, Eileen O' Rourke believes this publicity was essential in the successful marketing of the Garden Trail launch; however a key challenge moving forward will be to maintain the momentum on an annual basis. Keeping the trail "fresh and exciting" for visitors and ensuring there is a new story for repeat visitors is a key focus for the Trail.

Carlow's Garden Trail consistently features in national newspaper articles, the most recent in The Irish Independent promoting Ireland's best Secret Gardens (The Irish Independent, 2011). 2012 sees the launch of a 12-page brochure on the annual events in the various gardens involved in the Garden Trail. This information is also fully published on their website so those interested have access to what's on in the county. Carlow Tourism believes that the future of the Carlow Garden Trail will be managing to entice repeat visits to the gardens involved through a constantly evolving events programme.

7.2 Château Villandry, Loire Valley, France

Owned by the Carvallo family, Chateau Villandry and gardens are one of the most visited sites in France today. The Carvallo family invested a vast amount of money into the development of the Château's gardens when they purchased the estate in 1906.

As with all chateaux in the Loire Valley, Villandry is considered a UNESCO World Heritage Site. Caroline Piat of Villandry's Gardens believes that this alone is a major influencing factor in encouraging visitors to the estate. Another positive factor is the high concentration of other chateaux in the region. This is also a differentiating factor that the Loire Valley benefits from when comparing it to other regions in France.

In order to benefit from these positive aspects of what the Loire Valley has to offer, Villandry believes that it is imperative to have quality accommodation and dining amenities within close proximity. This provides visitors with ample opportunity to enjoy the gardens while on holiday, knowing that they are just a short drive from their accommodation.

A wide range of events are also organised throughout the year at Villandry. While art exhibitions are held within the castle, the gardens are the location of many wonderful outdoor events. Fireworks displays, chess championships, outdoor theatre productions are just some of the events that can be attended at Villandry. For the garden enthusiasts, September provides an opportunity to delve into the knowledge of the gardeners working at Villandry, as an interactive open day is held in the vegetable garden where visitors can buy the produce and attend demonstrations and workshops held by the gardeners.

Gardens at Villandry include a water garden, a herb garden, a flower garden, a vegetable garden and a series of ornate boxed hedges. However, it has been noted by Villandry that, although the quality and diversity of plants and flowers in the gardens are important, visitors enjoy seeing a "living garden". Gardens that are evolving and that have a presence of gardeners on site are a delight to visitors, and allow them the opportunity to see the art of gardening firsthand.

8.Our current position

8.1 Strengths

- **Established gardens** NI has a wealth of top-class gardens to offer visitors to the region. From the oldest rose breeding family to gardens dating back as far as 1740, there is something for everyone.
- Bright future ahead for tourism NI has received some high praise in recent times from global tourism experts. The National Geographic Traveller Magazine named Belfast as one of the world's top destinations for 2012. Trip Advisor has voted Belfast as the UK's best value city. Derry~Londonderry has been voted the UK's first ever City of Culture for 2013. Garden tourism is set to benefit on the back of this positive marketing for NI.
- **Garden Events** NI has a full events list for the garden tourist. From flowers to music to food, at almost every stage of the year it is possible to visit gardens with special events and festivals
- **Price advantage** As people continue to suffer through the economic crisis, garden tourism is one of the few low-cost activities that can be enjoyed by all the family.

8.2 Weaknesses

- Late development of Garden Trails Both RoI and GB have set up and established their Garden Trails. Some NI Garden Trails, such as the Antrim Garden Trail, have been set up in recent times however more publicity is needed to place them firmly on the gardens tourism map.
- Marketing to be expanded The overall marketing of gardens in NI is not yet as developed as that of RoI or GB. Opportunities exist to better incorporate gardens across the region into all tourism itineraries.
- **Belfast primary visitor destination** Belfast is the preferred visitor destination for tourists visiting the region. Other regions may struggle to appeal to visitors.
- Lack of appropriate road signage According to trade interviews, a lack of tourist signage has led to difficulties for tourists in making their way to their desired destination. Carlow Garden Trail has identified effective road signage as one of their key factors of success.

8.3 Opportunities

- **Potential for development** NI has a very real potential to further develop their garden tourism network. With more private gardens opening to the public, NI will have even more to offer their visitors.
- **Promote Gardens tourism as a value for money activity** Gardens can further promote their strength as a low-cost activity. More awareness will lead to more visits.

- Linking properties in NI Linking gardens to other properties in NI in close proximity could increase tourism to these properties. Co-promotion can make it easier for tourists to see what's on offer in NI and ensure properties are getting as much marketing exposure as possible.
- **Expanding activities in gardens** Workshops, demonstrations, concerts and festivals have are commonly used by international gardens to attract tourism. Ballyrobert Cottage Garden in Antrim has already capitalised on this opportunity with great success.

8.4 Threats

- Drop in overall tourism figures As the economic crisis continues to create problems for the tourism industry, overseas tourists are likely to be cautious about taking holidays overseas. This will inevitably affect tourist numbers to gardens in NI.
- **Competition from other sectors** Other types of outdoor areas such as forests and parks and other tourism activities such as music, food and sporting events, seem to have the edge on garden tourism.

9.A few suggestions

9.1 Development of Garden Trails

As NI already has some magnificent gardens to show to the public, a natural step would be to create more Garden Trails. Both Carlow and Donegal Garden Trail's commented on the benefits and increased visitor numbers their Garden Trails had generated.

9.2 Capitalise on low cost tourism option

With consumers still wary of their expenditure during difficult economic times, NI gardens should promote the price attractiveness of visiting local gardens. Visits to gardens could be promoted as being a cheap family outing, which is also based outdoors meaning children can benefit from plenty of fresh air and exercise, which is increasingly important in the face of rising childhood obesity.

9.3 Twinning of gardens

An alternative marketing approach could be the twinning of gardens in NI with popular RoI or GB gardens. This would give NI gardens direct access to their target market in the RoI and GB regions. Twinning NI gardens with similar interest gardens in other regions could increase the profile of NI gardens and therefore generate interest and opportunities.

9.4 Network of visitor activities

Creating a network of visitor activities in various regions across NI could encourage higher visitor numbers to gardens. NI visitors have already expressed their interest in what their local area has to offer so ensuring they are fully informed of what activities are available is essential.

9.5 Special Passes

In order to encourage as many visitors as possible, the idea of special garden passes could be set up for the NI region. This would be particularly effective for Garden Trails, however, linking historic houses with gardens in the same vicinity through special entrance prices could be of value to the NI garden tourism market. Monthly family passes could also be considered, especially in summer months when families are more likely to visit gardens in the region. Special prices can entice more regular visits from families based in the NI region.

9.6 Expanding activities in NI Gardens

Expanding the scope of activities in NI gardens could lead to further tourism to properties. Villandry Gardens in France not only provide workshops to gardening enthusiasts; they also provide summertime concerts, fireworks displays, outdoor theatre and chess events. All of these activities significantly increase the potential target audience for their gardens. From music to arts and theatre, a wider range of tourist groups can be targeted. Although Belfast's Botanic Gardens host similar events, other gardens in the NI region could benefit from higher visitor numbers by hosting these types of activities.

9.7 Making it easy for the tourist

For tourists from abroad, it is important that any language barriers do not pose difficulties for them. Literature and signs in various foreign languages will help them to understand what gardens have to offer and ensure they have a positive experience during their visit.

9.8 Effective road signage

Poor signage can be a significant barrier to successful tourism in any region. As the majority of tourists visiting the NI region do not know the region well, they depend heavily on road signs to find their way to destinations. It is imperative that these signs are effective in guiding tourists to their destination to allow them to make the most of what the region has to offer.

10. Conclusion

It is clear from the research undertaken that Northern Irish Gardens stand proud among the gardens of the world. The challenge for NI is to entice more people into their gardens by setting up a further network of garden trails and ensuring access to these gardens is as easy and as hassle-free as possible. A firm undertaking to link gardens in the region can provide an accessible network for all visitors to enjoy.

11. Sources

10 Best: Secret gardens (Irish Independent, 7th March 2011) Activities undertaken by visitors to Northern Ireland 2009 (NITB, 2010) Activities undertaken by visitors to Northern Ireland 2008 (NITB, 2009) Activities undertaken by visitors to Northern Ireland 2007 (NITB, 2008) Activities undertaken by visitors to Northern Ireland 2006 (NITB, 2007) Activities undertaken by visitors to Northern Ireland 2005 (NITB, 2006) Activities undertaken by visitors to Northern Ireland 2004 (NITB, 2005) Antrim Garden Trail - www.antrimgardens.com Ballyrobert Cottage Garden and Nursery - www.ballyrobertcottagegarden.co.uk Carlow Garden Trail - www.carlowgardentrail.com Château de Villandry - www.chateauvillandry.fr Chelsea Flower Show 2011: Sold out (Telegraph, 12th May, 2011) Northern Ireland Visitor Attraction Survey, January to December, 2010 (DETINI, 2011) Donegal Garden Trail - www.donegalgardentrail.com The National Trust - www.nationaltrust.org.uk Visitor Attitudes Survey (NITB, 2009)

This report has been compiled by Mintel Ireland and OCO Global on behalf of NITB. Every care has been taken to ensure accuracy in the composition of this paper. NITB cannot accept responsibility for omission or errors but these will be rectified in future publications when brought to our attention. Please direct any queries to <u>insights@nitb.com</u>.