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Academic Research Paper

Garden tourism visitor profiling: a weighted key informant approach from the Borromean Gulf, Lake Maggiore

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Abstract

Purpose - this study examines perceived visitor profiles and motivations within the garden tourism niche of the Borromean Gulf, Lake Maggiore, Italy, during the 2024–2025 period. It addresses a methodological and managerial problem: destinations often need to understand evolving niche demand without access to disaggregated visitor-level data. The paper therefore has a dual aim. First, it provides an exploratory, guide-reported demand profile of heritage garden visitors, highlighting perceived shifts in international source markets, demand dynamics and emerging motivational segments. Second, it evaluates whether the localized interpretive competence and field knowledge of certified tour guides can function both as a strategic destination capability and as a structured key informant source for destination intelligence. *Design/methodology/approach* - to capture aggregate demand trends without direct visitor surveys, this paper adopts a qualitative-exploratory research design using a provisional, volume-based weighting protocol. Semi-structured interviews were conducted with 31 certified local tour guides who collectively mediate an estimated volume exceeding 100,000 annual visits across the primary botanical and historic gardens of the Borromean Gulf, Lake Maggiore. Rather than treating all informant accounts equally, the qualitative insights, thematic observations, and demographic guide-reported assessments provided by each guide were subjected to an exploratory weighting scheme based on estimated mediated visitor volumes. The data were then analyzed using Reflexive Thematic

Analysis (RTA) to identify dominant patterns, perceived market shifts, and behavioural segments as reported by the informants. This approach allows the study to transform highly specialized qualitative field observations from key informants into an exploratory overview of guide-reported market demand dynamics. All quantitative estimates presented in this study are exploratory and guide-reported rather than derived from verified visitor-level data. Qualitative findings represent professional perceptions and field interpretations rather than direct measurements of tourist behaviour.

Originality/value - This study offers an application of the Resource-Based View (RBV) and VRIO framework to localized human capital in niche tourism. Methodologically, it introduces an exploratory, replicable and cost-effective alternative to mass visitor surveys. This complementary approach is particularly suited to resource-constrained regional destinations lacking official attraction-level data.

Practical implications - the findings reveal three emerging dynamics perceived by the guides: an increase in the weighted informant estimate of North American visitors, which informants suggest may be linked to destination substitution from overtouristed Lake Como; a consolidated senior female wellness segment which guides perceive as having above-average discretionary spending capacity and a resilient relational loyalty dynamic perceived by informants to be stabilizing DACH B2B channels. Practically, these insights enable destination management organisations (DMOs) to optimize marketing strategies, tailor guiding services, and discuss options to mitigate overtourism through strategic dispersal.

Keywords: garden tourism; visitor profiling; Resource-Based View; VRIO framework; tour guides.

JEL Codes: Z32; Z33; M31; L83

1. Introduction

Garden tourism has acquired strategic relevance in the evolving tourism landscape, as the global shift toward well-being and environmental values expanded its demographic reach. This transition elevated garden visiting from a cultural niche into an economically significant sector. Recent assessments (Benfield, 2021) confirm this consolidation, highlighting how sites adapt to evolving expectations through targeted experience management and visitor profiling.

Yet in a mature market such as Italy's, where garden tourism remains understudied in a systemic fashion, a gap persists between the traditional offer and the motivations that now drive visitor behaviour. Despite academic acknowledgement of the issue, comprehensive medium-term profiles reflecting the specificities of the Italian context are still lacking. While specialized heritage segments have gained traction within destination management, profiling niche tourism demand remains methodologically challenging when direct, disaggregated visitor-level data are structurally unavailable. Existing research frequently treats this data scarcity as a structural limitation rather than an epistemological opportunity. Consequently, a critical research gap emerges regarding how frontline tourism professionals – specifically licensed tour guides – can function as structured key informants capable of decoding shifting motivations, experiential value co-creation, and perceived market dynamics at the destination level.

This study addresses that gap through an exploratory lens. It analyses perceived shifts in visitor profiles, motivations and behaviours in historic and botanical gardens on Lake Maggiore, with particular

attention to the Borromean Gulf, across the 2024–2025 empirical period, leveraging structured informant perspectives to outline exploratory outlooks for subsequent seasons without claiming predictive forecasting.

Theoretically grounded in the Resource-Based View (RBV) and the VRIO framework, this paper conceptualizes the localized interpretive competence of certified tour guides as an internal destination capability that may directly influence competitiveness. Operating at the strategic interface of the service supply chain, these frontline professionals function as acute sensors of qualitative market insights.

Their direct and continuous interaction with visitors enables them to interpret perceived demand shifts, transforming qualitative field observations into a valuable complementary intelligence mechanism for destination monitoring.

Three explicit research questions structure the exploratory inquiry. First, the study investigates how certified tour guides interpret and report perceived shifts in the demographic profile, motivations, and behaviours of garden tourists in the Lake Maggiore region. Second, it examines how frontline informant perspectives can be structured as a complementary intelligence mechanism to outline exploratory demand shifts and inform destination management strategies. Third, it evaluates whether a volume-weighted key informant protocol can serve as a methodologically transparent proxy for visitor demand profiling in contexts where direct survey data are structurally unavailable.

2. Literature review and theoretical framework

2.1. Garden Tourism: evolution of demand and new push factors

Garden tourism may be defined as the voluntary, temporary visit to gardens for pleasure, recreation and education (Connell, 2004). As dynamic environments combining art, history, and nature, gardens are increasingly valued as green spaces offering respite from urban life and enabling deep connection with the natural world (Benfield, 2021). Visitor motivations are diverse: they encompass the desire to understand the history and culture behind a garden's design, curiosity about horticultural techniques, the search for tranquillity, inspiration for personal gardening projects, and the discovery of notable landscape architects' work (Connell & Meyer, 2004; Kempniak et al., 2017). Post-pandemic dynamics have added wellness and psychophysical restoration as emergent push factors, progressively complementing the traditional cultural and aesthetic motivations that long dominated the sector. Visitor profiling, therefore, cannot be confined to demographic variables alone; it must probe the push factors that move visitors. Internationally, the structuring of garden tourism has long relied on institutional frameworks such as the UK's National Garden Scheme (NGS) or the National Trust, which have successfully benchmarked the integration of historic heritage into public tourism circuits (Connell, 2004; Benfield, 2021). In Italy a similar role is partially fulfilled by the FAI (Fondo per l'Ambiente Italiano), modeled on the British National Trust to protect and open iconic historic green assets to the public. However, the broader Italian garden sector occupies a mature yet structurally fragmented position. To address this spatial fragmentation and align with international standards, the Italian landscape relies on structured public and private networks. On the one hand, the Associazione Parchi e Giardini d'Italia (APGI) - established in 2011 with the support of the Ministry of Culture - coordinates national umbrella initiatives such as "Garden Route Italia" (a portal cataloguing over 200 gardens across thematic itineraries) and the annual "Appuntamento in Giardino" event. These promotional efforts have been further reinforced by targeted resources from the National Recovery and Resilience Plan (PNRR) for historic site restoration (Dell'Era, 2022). On the other hand, at the private operational level, Grandi Giardini Italiani (GGI) represents the primary horticultural tourism network,

encompassing over 140 historic estates across Italy and neighboring countries. However, from a destination management perspective, iconic botanical attractions do not function as isolated entities; rather, they are deeply embedded within local tourism ecosystems. While the Borromean estates exert a powerful gravitational pull, their broader socio-economic impact relies heavily on the capacity of destination stakeholders to foster spatial dispersal and extend visitor length of stay. Despite the high strategic visibility of this sector, systematic academic research probing empirical visitor profiling and demand dynamics in Italian garden destinations remains limited. The Borromean Gulf thus offers a strategically relevant empirical context to address this gap (for a detailed overview of the territorial context and destination flows, see Section 3.2).

2.2. The tourist guide as a strategic resource: defining frontline expertise

Tour guides occupy a pivotal front-line position in the tourism industry, serving as intermediaries between visitors and destinations (Cohen, 1985; Weiler & Walker, 2014). They are primarily responsible for the overall impression visitors form of a destination's tour services and possess the capacity to transform a visit into a memorable experience, what Ap and Wong (2001) call the "moment of truth". The present study proposes to conceptualize the guide's role as that of a boundary spanner (Aldrich & Herker, 1977; Weiler & Black, 2015). In this view, the guide is a primary facilitator of value co-creation, responsible for imbuing site visits with emotional and personal meaning (Hansen & Mossberg, 2017; Prebensen et al., 2017). This interaction between frontline professionals and cultural heritage visitors acts as a primary mediator of experiential authenticity, shifting the source of value from the physical destination to the interpersonal dialogue (Leong et al., 2024). Operating at the interface between organisation and external environment, guides also perform a crucial intelligence function, intercepting emerging market signals and visitor behaviour patterns that frequently escape conventional data collection methods.

This professional figure is defined through international standards (World Federation of Tourist Guide Associations WFTGA, 2020; European Committee for Standardization CEN, 2008) and, at European level, by the European Federation of Tourist Guide Associations (established in 1985), all of which foreground territorial specificity, linguistic competence and interpretive expertise. In Italy, Law No. 190/2023 and Ministerial Decree 88/2024 strictly regulate the profession by requiring a rigorous national licensing examination. This regulatory framework establishes formal entry barriers that structurally restrict the supply of qualified professionals, thereby anchoring their specialized interpretive competence as a scarce and highly qualified territorial resource.

Existing research has examined tourist guides primarily in relation to their professional roles, professional standards, interpretive and communicative functions, performance, knowledge interactions, and contribution to visitor experiences (Cohen, 1985; Ap & Wong, 2001; Weiler & Walker, 2014; Weiler & Black, 2015; Hansen & Mossberg, 2017; Koç & Ulema, 2024; Rihova & Alexander, 2025; Yu et al., 2026). However, their use as key informants for the systematic reconstruction of visitor profiles and perceived demand dynamics remains comparatively underexplored. This study addresses that methodological gap by developing a structured, volume-weighted key informant approach based on the accumulated frontline observations of certified tourist guides. Its specific originality lies in mobilizing these observations to produce an exploratory profile of visitor origins, motivations, behaviours, and perceived market dynamics where disaggregated visitor-level data are unavailable.

2.3. The resource-based view (RBV) of tourism: strategic capabilities

The Resource-Based View (RBV) provides a theoretical foundation for understanding how destinations achieve sustainable competitive advantage through unique, hard-to-imitate internal resources (Barney & Hesterly, 2018). While originally developed in the context of firm-level strategy, the RBV has been progressively extended to tourism destinations, where localized human capital and interpretive competence have been identified as primary sources of non-replicable competitive value (Ritchie & Crouch, 2003; Dwyer & Kim, 2003). This study explores whether the certified interpretive competence of the tourist guide can be conceptualized as a strategic asset, analyzing it qualitatively through the VRIO Framework. Crucially, this study does not test RBV propositions quantitatively; rather, it uses VRIO framework as a qualitative interpretative lens to explore the potential strategic value of qualitative human assets.

Table 1. Conceptual application of the VRIO framework to tour guide expertise.

VRIO Criteria	Key question	Proposed analytical interpretation	Potential competitive implication
Value (V)	What evidence can be interpreted through the Value lens?	Evidence consistent with value. The guide translates botanical and historical heritage into a highly personalised, emotionally engaging experience, maximising visitor satisfaction and the perceived value of the site. Without interpretive mediation, heritage remains largely inaccessible to non-specialist visitors.	Potential competitive parity. (Necessary condition for market participation, if value is confirmed)
Rarity (R)	What evidence can be interpreted through the Rarity lens?	Potential relevance consistent with rarity. The national licensing examination (Italian Law 190/2023; MD 88/2024) creates a structural supply constraint, that restricts the pool of qualified professionals available in the market.	Potential temporary competitive advantage. (If value and rarity are both supported)
Inimitability (I)	What evidence can be interpreted through the Inimitability lens?	Evidence consistent with inimitability. The guide's expertise is not a mere accumulation of factual knowledge, but a strategic human resource combining interpretive intelligence, relational capital, and deep territorial embeddedness. This combination generates causal ambiguity (Barney, 1991), making it difficult for competitors to identify or replicate the specific factors driving high-quality delivery. Consequently, neither digital substitutes nor non-certified personnel can fully reproduce this profile.	Exploratory indication of potential sustainable advantage (Conditional upon the combined presence of value, rarity, and causal ambiguity)
Organisation (O)	What evidence can be interpreted through the	Partial evidence consistent with organisation, with significant margins for improvement. Tour operators, travel agencies and DMOs only	Potential indication of sustainable competitive advantage

VRIO Criteria	Key question	Proposed analytical interpretation	Potential competitive implication
	Organisation lens?	partially leverage guides as strategic intelligence sources. Key informants report frequent repeat requests from DACH visitors (§4.5), indicating that relational capital is being generated, though not yet systematically integrated at the destination level. Perceived disintermediation trends signal an emergent shift toward localized resource capture. This gap between resource potential and formal organisational exploitation represents a primary bottleneck.	(Partially suggested by fieldwork. High improvement potential)

Note: Based on 2024–2025 qualitative fieldwork. Framework adapted from Barney (1991) and Barney and Hesterly (2018). This table provides a methodological proposal and a conceptual positioning based on exploratory fieldwork. Analytical interpretations reflect guide-reported perceptions and qualitative field observations rather than formally tested propositions. The table is intended as a conceptual positioning tool, not as an empirical demonstration of VRIO criteria.

The VRIO analysis synthesized in Table 1 suggests a potential paradox within the destination's management. While the frontline expertise of certified guides appears to align with the conceptual thresholds of Value, Rarity, and Inimitability - shielded by the causal ambiguity of localized cultural knowledge (Barney, 1991) and national regulatory barriers - the institutional architecture may fail to fully capitalize on this asset. This dynamic indicates how active interpretation could transform static heritage into value-added tourist experiences. As detailed in the empirical analysis, the systematic disconnect under the 'Organisation' dimension might prevent the conversion of localized relational capital into a fully realized destination-level competitive potential.

The decision to employ guides as key informants, rests on their structural role as potential boundary spanners within the destination system. These professionals accumulate longitudinal insights into visitor flows, motivations and service frictions that few other qualitative sources in this niche context can provide.

In this study, their expertise is therefore treated in two analytically distinct ways: as a potential strategic destination resource, interpreted through the RBV and VRIO framework, and as a methodological source of structured field intelligence for exploratory demand profiling.

2.4. Experience management and the strategic role of gardens

Historic and botanic gardens occupy a distinctive niche within cultural heritage tourism. They function simultaneously as aesthetic environments, repositories of scientific and historical knowledge and, increasingly, as restorative landscapes. This study explores this multi-layered nature through the concept of their living museum quality (Funsten et al., 2020; Oliveira Paiva et al., 2020). Unlike static heritage sites, gardens are inherently dynamic. They shift with the seasons, respond to light and weather, and often demand active interpretation to be fully appreciated, and for their latent cultural value to be

realized. Post-pandemic demand for safe, uncrowded and physically restorative environments has further highlighted this strategic positioning. Historic gardens meet this demand in a way that generic green spaces cannot: they combine the restorative benefits of nature immersion with the cognitive and aesthetic stimulation of cultural heritage. In niche tourism contexts characterized by high experiential involvement, loyalty and revisit intention are often closely tied to the depth of the emotional and sensory experience (Pine & Gilmore, 1998; Shapoval et al., 2020). From a Resource-Based View perspective, it is precisely at this junction that the guide's interpretive role can emerge as a key facilitating factor, operating as the core strategic capability that transforms static site attributes into an uncopiable, high-value experience.

3. Materials and methods

3.1. Research design and qualitative-exploratory approach

A qualitative-exploratory design with a retrospective approach was adopted, grounded in the key informant method (Creswell & Creswell, 2018; Patton, 2015). Tourist guides are conceptualized here as potential boundary spanners (Aldrich & Herker, 1977) who occupy a strategic position at the interface between the supply system and the market, facilitating the co-creation of experiential value through interpretive interaction (Leong et al., 2024). This positioning allows them to observe broader visitor dynamics across the destination ecosystem and offer qualitative interpretations of shifting tourist motivations (Benckendorff et al., 2019). To gather primary data, the investigation utilized semi-structured interviews designed to capture guides perceived observations regarding tourists' interest in gardens across various formats, ranging from day trips to multi-day itineraries. Informants provided a retrospective assessment for the years 2024 - 2025 seasons alongside prospective estimates for subsequent seasons. In line with the exploratory scope of the VRIO framework (Table 1), these accounts offer qualitative indications and interpretive evidence rather than deterministic metrics. Given the structural absence of disaggregated, site-specific official visitor data for the specialized garden tourism sub-segment, this qualitative approach does not merely substitute for missing quantitative metrics; rather, it provides contextually rich frontline insights that complement broader territorial metrics by decoding micro-level visitor motivations and experiential value creation.

Researcher positionality and reflexivity. The researcher's professional embeddedness in the regional guiding community provided contextual familiarity and facilitated access to participants, while also representing a potential source of interpretive bias. Familiarity with the local professional network may have influenced participant recruitment, potentially introducing self-selection effects, as well as the interpretation of guide statements, the coding of field notes, and the construction of overarching themes. To make these positionality effects transparent and methodologically manageable, the researcher was excluded from the key informant sample, all interviews followed a standardized non-leading protocol, and coding trajectories were systematically documented. These safeguards do not eliminate positionality effects, but they render them explicit and consistent with the qualitative-exploratory scope of the study.

3.2. Research context and informant selection

Geographic and economic context. The fieldwork focuses on garden tourism within the Borromean Gulf of Lake Maggiore, a prominent geographic hub centred on the historic gardens of the Borromeo properties, specifically Isola Bella, Isola Madre, and Villa Pallavicino, alongside the botanical gardens of Villa Taranto. This macro-area represents a highly significant case study characterized by an annual influx of several hundred thousand visitors. Official regional data confirm this lake district as Piedmont's second most prominent tourist destination after the metropolitan area of Turin. In 2025, the district recorded 1,457,550 arrivals, representing a 5.74% increase compared to 2024, and total overnight stays reached 4,632,057, yielding an average length of stay of 3.2 nights (which marks a 5.66% year-on-year increase) (VisitPiemonte DMO, 2025). The seasonal tourist calendar in this region spans structurally from mid-March to the end of October. The Borromean Gulf does not operate as an isolated tourism enclave but rather as the strategic core of a broader, integrated lake destination system. Stresa, located on the western shore of Lake Maggiore directly facing the Borromean Islands, functions as the primary mainland hub for international visitors: its historic luxury hotels, its strategic positioning along the international Simplon railway line, its close proximity to Milan Malpensa International Airport, as well as to the cities of Milan and Como and the Swiss border, along with its boat landing stages, serve as the principal logistical gateway through which guided tourism flows are channelled towards the garden sites. The wider destination ecosystem of which the Borromean Gulf forms, part includes Villa Taranto's botanical gardens at Verbania – one of the most significant botanical collections in Europe – Parco Pallavicino in Stresa, the Sacri Monti of Ghiffa and Orta (UNESCO World Heritage Sites) as well as Orta lake, and the Rocca di Angera. Together, these sites constitute an integrated cultural and botanical itinerary that international tour operators – particularly those serving the DACH and North American markets – systematically incorporate into multi-day programmes. This systemic embeddedness is directly relevant to the methodological design of the present study. The 31 certified guides who participated as key informants operate precisely at the interface between this wider destination system and the garden tourism niche: they accompany visitors who arrive through the broader lake tourism infrastructure – international flights, rail connections, coach transfers, private chauffeur services (NCC), and lake navigation services – and whose garden visits represent an integral experiential element of a multi-site itinerary rather than a standalone excursion. The demand patterns, source market dynamics, and behavioural segments documented in the findings therefore reflect not only the intrinsic attractiveness of the Borromean gardens but also the positioning of the Borromean Gulf within the competitive landscape of Northern Italian cultural tourism.

Institutional and regulatory transition. Informant selection coincided with a critical, structural turning point in the Italian regulatory landscape. Prior to the enforcement of Law No. 190 of December 13, 2023, and its subsequent implementing regulation (Ministerial Decree 88/2024), professional tour guide licensing was strictly decentralized and managed on a provincial or regional tourist-district basis. This localized framework ensured that only professionals certified within specific geographic boundaries could legally operate there, a mechanism that historically incentivized a deep, hyper-local specialization. The introduction of a standardized national professional title, which became fully effective in January 2025, aimed to unify and de-regulate the profession across the national territory. However, this shift concurrently introduced significant industry uncertainty regarding the long-term preservation of specialized, hyper-local territorial knowledge. Consequently, the dataset collected for

this study captures a unique temporal snapshot of garden tourism demand, as mediated by professionals with deep, historical territorial embeddedness at the precise moment of transition from a decentralized provincial system to a centralized national licensing regime.

Sampling frame and informant profile. The participant selection followed a purposive key informant sampling strategy combined with a voluntary response mechanism, targeted at the official professional community. The official register of licensed tour guides for the Province of Verbano-Cusio-Ossola lists a nominal total of 153 professionals. However, a preliminary screening revealed that a significant proportion had ceased active practice, leaving only 70 active guides currently operating in the area. Within this active cohort, 25 individuals hold secondary employment, conducting tours only on an occasional or part-time basis. The remaining 45 professionals were classified as full-time practitioners. Out of these, 31 fully qualified guides agreed to participate in the study, yielding a response rate of 69%. This participation rate compares favourably with established methodological benchmarks for professional purposive samples in qualitative tourism research (Patton, 2015). All 31 selected informants regularly conduct specialized garden tours, explicitly excluding professionals solely dedicated to Alpine trekking or generic urban itineraries. Individually, these informants accompany an estimated volume of between 400 and 7,200 tourists annually. Cumulatively, this sample provides a rich repository of field observations reflecting a vast pool of guide-reported visitor estimates.

To guarantee the trustworthiness and contextual alignment of the insights, strict inclusion criteria were applied. First, informants had to possess a valid, state-recognized professional license. Second, they needed a minimum of five years of continuous, uninterrupted guiding activity within the specific lake district prior to data collection. Third, the investigation required active involvement in managing diverse visitor typologies across varying geographical origins, languages, and visitation modalities. Finally, the systematic and regular integration of historic and botanical garden visits within baseline professional itineraries was required.

The resulting heterogeneity of the sample, encompassing professionals catering to distinct geographic, cultural, and linguistic target markets, constitutes a core methodological asset. This diverse composition allows the study to effectively map the complexity of garden tourism demand, treating it not as a homogeneous mass but as an intricate matrix of specific market niches, each governed by distinct perceived behavioural patterns and specific operational dynamics, grounded in weighted informant estimates.

3.3. Data collection and weighting protocol

Interview protocol and administration. The data collection phase began with an introductory section designed to obtain informed consent and establish each key informant's professional profile. The semi-structured individual interviews lasted between 20 and 25 minutes and were conducted in hybrid mode, through both in-person sessions and telephone consultations. To improve recall accuracy, the protocol was distributed two to three days in advance, allowing guides to consult operational records, booking confirmations, tour logs and agency communications. Interviews were deliberately not audio-recorded to preserve informant candour and facilitate open disclosure regarding market dynamics. Instead, a real-time joint note-taking protocol was implemented during each session, so that key statements and insights could be immediately checked with informants. The questionnaire combined narrative open-ended questions with structured quantification elements, including percentage estimates, age groups and preference scales. This

question format preserved interpretive depth while supporting cross-informant comparability (Dawadi et al., 2021).

Weighting protocol and coefficient structure. To account for the highly heterogeneous operational scale across informants, an exploratory weighting protocol was applied to the guides' demographic and flow estimates. Specifically, each guide's responses were weighted according to the absolute volume of tourists managed during the reference period. For country-of-origin data, a tiered coefficient structure was introduced as a working hypothesis. Under this specification, calculations were performed separately for each guide before aggregation, assigning 50% weight to the primary country of origin, 30% to the second, and 20% to the third. This two-step protocol ensures that a country ranked first by a high-volume informant exerts a proportionally greater influence on the final aggregate index than the same rank reported by a low-volume practitioner. Applied uniformly across the dataset, this 50–30–20 structure should be understood as an exploratory heuristic proposed by the researcher rather than a statistically validated econometric model. To assess the sensitivity of the results to this hypothetical specification, the analysis was replicated using an equal-weighting baseline (one-third per rank, conventionally reported as 33–33–33), a more conservative scheme (40–35–25), and a more concentrated stress-test specification (60–25–15), which places greater emphasis on the first-ranked country of origin. The purpose of this comparison is not to establish statistical validity, but to assess whether the principal source-market patterns and directional trends remain substantively stable across alternative coefficient structures. Although absolute estimates vary across specifications, the ranking of the leading guide-reported source markets remains broadly stable. Some rank changes occur across specifications and between years, but these generally concern adjacent market positions rather than substantial alterations in the overall source-market structure. Most importantly, the strengthening of the United States is consistently observed across all weighting schemes. This provides exploratory support for the robustness of the main descriptive conclusions, while also indicating that precise rank positions among secondary segments should be interpreted cautiously. The resulting quantitative proportions should therefore be interpreted as indicative macro-trends and descriptive proxies rather than precise parametric estimates.

3.4. Data analysis

Qualitative data were analysed using Reflexive Thematic Analysis (RTA), following the six-phase approach of Braun and Clarke (2022). RTA was chosen for its capacity to surface nuanced patterns of meaning through iterative researcher reflexivity rather than mechanical coding. Audio recording was intentionally omitted to maximise informant spontaneity - a deliberate methodological choice consistent with established qualitative protocols (Patton, 2015; Rutakumwa et al., 2020). Structured field notes were compiled in real time and expanded within hours of each interview.

The six analytical phases proceeded inductively. Phase 1 involved repeated reading of all field notes for data familiarisation. Phase 2 entailed systematic initial code generation, conceptualising meaningful units across the full dataset to yield 47 initial codes, subsequently consolidated into 27 analytical constructs through iterative grouping. Phase 3 involved grouping related codes into candidate sub-themes. Phase 4 comprised the review of candidate themes against the full coded dataset to verify internal coherence and external differentiation. Phase 5 defined and named the final themes. Phase 6 produced the integrated report. Qualitative thematic findings were integrated with the weighted guide-reported visitor estimates described in §3.3, via concurrent mixed-method integration (Creswell

& Creswell, 2018), contextualising each main qualitative theme within the aggregate demand proxies.

Five main overarching themes emerged from this analytical process: (1) structural shift in international source markets; (2) demographic consolidation of the guided visitor profile; (3) post-pandemic behavioural transformation; (4) destination physical infrastructure and spatial accessibility; and (5) visitor behavioural individualisation and experiential reorientation. A representative sample of coding structure, sub-theme, and illustrative paraphrastic quotation is provided in Table 2.

Table 2. Reflexive Thematic Analysis: coding structure, theme development and illustrative quotations.

Initial Codes	Sub-themes	Overarching Themes	Illustrative Quotation
Destination substitution effect; Comparative price advantage; Cruise-led extension;	North American market expansion; destination substitution from Lake Como	Structural shift in international source markets	Cruise groups are covering the full season for two years now; during their pre- and post-extension tour they used to stay in Como and sometimes visited the Borromean Islands and Orta Lake during a day trip. Then the agency read the excellent reviews about Lake Maggiore and started to accommodate their customers here. (KI-30)
Relational contracting; Multi-actor trust chains; transactional contracting in core EU markets; agencies hire guide separately from ticket purchase;	DACH relational loyalty; multi-actor trust chain; dual-track supply chain segmentation, contracting European markets	Structural shift in international source markets	I have German agencies booking me for over ten years. They just confirm the date. But this year the groups are smaller. The crisis is real. (KI-4)
Emerging markets; Asian segment attrition;	Emerging Eastern European markets; post-COVID disappearance of Asian segment	Structural shift in international source markets	For the first time contacts from Bulgarian and Romanian agencies. But the Japanese are gone since COVID. Not one group in four years. (KI-2)
Demographic feminization and aging; botanical niche specialization; group based social travel;	Senior female visitor dominance; Garden Club segment consolidation	Demographic consolidation of the guided visitor profile	Almost always women, retired, passionate about botany. They travel together; the group becomes their social world. (KI-28)
Age based channel	Young visitor	Demographic	I never see anyone under 45 in my

divergence; digital disintermediation; direct-to-consumer ticketing;	absence from guided channels; digital-direct vs traditional distribution	consolidation of the guided visitor profile	groups. They go directly online except for US couples or families. (KI-7)
Post-pandemic outdoor wellness demand; media driven destination discovery; off-peak seasonal redistribution;	Post-pandemic wellness urgency; media-driven destination discovery; botanical spectacle as pull factor;	Post-pandemic behavioural and motivational transformation	After the pandemic visitors need beauty, need to be outdoors. October is growing - they think it will be quieter and less expensive and are pleasantly surprised. (KI-20)
Honeymoon return visit; school trip memory;	Biographical revisit motivation; destination as life milestone	Post-pandemic behavioural and motivational transformation	We came for our honeymoon thirty years ago and now we are back for the anniversary. The garden was part of our story. (KI-20)
Mobility infrastructure deficits; physical accessibility barrier; on-site operational friction; absence of visitor assistance staff;	Unmanaged physical risks and mobility exclusion on site; service infrastructure deficiencies	Destination physical infrastructure and spatial accessibility	The steps are dangerous and unmarked. I lost a client during their free time because she could not manage the turnstile with her walker, and there was nobody to help. (KI-15)
Experiential reorientation; social media-driven distraction; selective high-value spending;	Post-pandemic behavioural individualisation; experiential spending reorientation	Visitor behavioural individualisation and experiential reorientation	They film everything for Instagram, then fall behind and lose the group. They buy less but spend more on one good thing. (KI-12)

Note: Illustrative quotations are representative excerpts derived directly from structured field notes (N=31). Quotation marks have been omitted to signify close paraphrastic reconstructions compiled during and immediately after each interview, rather than verbatim audio transcriptions. Direct audio recording was omitted by design to preserve informant spontaneity. Table 2 presents a representative selection of 27 analytical constructs derived from 47 initial codes. Identifiers (KI-2, KI-4, KI-7, KI-12, KI-15, KI-20, KI-28, KI-30) denote individual anonymised tour guides (key informants) selected across the five overarching themes to provide a representative qualitative cross-section.

4. Results

The findings integrate the qualitative insights extracted from the five overarching themes identified through Reflexive Thematic Analysis – structural shift in international source markets, demographic consolidation of the guided visitor profile; post-pandemic motivational transformation;

destination physical infrastructure and spatial accessibility; and visitor behavioural individualisation and experiential reorientation - with the weighted operational estimates provided by the key informants. Numerical data were subjected to the volume-based weighting protocol outlined in §3.3. This process converted individual expert perceptions into aggregate summary indicators, providing an exploratory overview of perceived market dynamics exclusively within the specific channel of guided tourism.

4.1. Sample validation

The methodological trustworthiness of the empirical findings is supported by two interconnected factors: informant authority and operational representativeness. The study included 31 key informants boasting an average professional tenure of 20.8 years within the study area. In terms of operational scale, the participating guides collectively reported managing an estimated flow of 107,130 tourists in 2024. This estimate rose to approximately 114,530 tourists during the 2025 season. Patton (2015) demonstrates that information richness and thematic depth within highly specialized participant groups depend on the strategic selection of frontline experts rather than statistical sample size. This methodological benchmark supports the exploratory validity of the purposive sample size for qualitative, information-rich research.

Table 3. Summary of the profile of key informants and volumes

Sample Feature	Value
Sample size (N)	31 Key Informants
Average professional experience	20.8 years
Weighted guide-reported visitor volume estimate 2024	107,130
Weighted guide-reported visitor volume estimate 2025	114,530
Main territorial focus	Gardens, Borromean Gulf

Note: Based on 2024–2025 empirical fieldwork data collected by the author. Volumes represent aggregate guide-reported estimates derived from the weighting protocol outlined in §3.3 rather than direct visitor census counts.

4.2. Visitor profile: age and gender

Age dynamics. The descriptive analysis indicates that the senior segment, defined here as visitors aged over 65, is perceived by informants to represent the dominant share of the guided visitor flow across both observed seasons, with a further increase in 2025. Conversely, the marginal representation of visitors aged 19–45 is a structural feature inherent to the research design rather than a reflection of overall destination market demand. As noted in contemporary tourism literature, travellers within this younger demographic bracket systematically favour autonomous, digitally mediated forms of heritage consumption, including smartphone applications, self-guided audio itineraries, and social media-curated trails (Benckendorff et al., 2019). Crucially, this demographic void is further explained by supply chain segmentation. Younger, tech-savvy independent traveller flows – alongside budget-

conscious outbound planners – increasingly opt for transactional, bundled services. Instead of hiring independent external guides, informants note that these visitors systematically purchase direct entry ticket plus internal venue guide packages directly from the heritage sites' proprietary online platforms (KI-7). Consequently, because the sample of key informants reflects the traditional, relationship-based B2B procurement chain of independent professionals, these transactional digital-direct visitors remain structurally uncaptured within this dataset.

The demographic profile presented here specifically defines the perceived profile of the guided garden tourist within conventional distribution channels. Visitors under the age of 18 remain statistically secondary, appearing almost exclusively within school groups or multi-generational family contexts.

Table 4. Perceived distribution of guided visitors by age (2024–2025).

Age category	2024 (Guided visitors)	2024 (%)	2025 (Guided visitors)	2025 (%)
Under 18 years	8,915	8.32%	11,540	10.08%
19–45 years*	<1,000	<1%	<1,000	<1%
46–65 years	15,780	14.73%	13,885	12.12%
Over 65 years	82,435	76.95%	89,105	77.80%
TOTAL	107,130	100.00%	114,530	100.00%

Note: Based on 2024–2025 empirical fieldwork data collected by the author. Data refer exclusively to weighted guide-reported estimates within the certified guided channel. *Because the 19–45 category is reported as a marginal threshold value (<1,000; <1%), the displayed category counts should be read as rounded descriptive estimates rather than as additive census totals. The <1% value for the 19–45 category signifies statistical marginality within the certified guide channel rather than absolute destination absence.

Beyond their numerical dominance, the qualitative significance of the senior segment is frequently highlighted across the informant testimonies. Visitors aged over 65 are consistently perceived by guides to combine an above-average discretionary spending capacity with the temporal flexibility and inclination required for slow, immersive engagement with botanical heritage (KI-28). Informants observe that this specific fruition modality is associated with perceived higher per-visit revenue and a clear openness to interpretive depth. This qualitative profile appears to align with the macro-dynamics of the longevity economy currently reshaping European cultural tourism (Gaušas et al., 2025).

Gender distribution. Female visitors are estimated to account for approximately 73% of the total guided flow in both 2024 and 2025, demonstrating remarkable consistency across the study period. Informant narratives attribute this trend to the high incidence of visitors affiliated with specialized garden clubs and cultural associations (KI-28). The guides' qualitative reports suggest that this flow may be further sustained by senior female travellers, including widows who use organised group travel for social connection, and by women travelling independently when partners do not share the same interest in botanical heritage. These observations appear to align with broader tourism literature identifying women as primary decision-makers and participants in cultural and nature-based tourism niches (Alén et al., 2016). According to the informants, a sub-segment of senior female travellers appears to engage with garden tourism primarily as a catalyst for interest-based social bonding (KI-

28), turning botanical enthusiasm into a foundation for shared experience and social connection (Richards, 2021).

Table 5. Distribution of guided visitors by gender (2024–2025).

Gender category	2024 (Guided visitors)	2024 (%)	2025 (Guided visitors)	2025 (%)
Female	78,294	73.08%	84,614	73.88%
Male	28,836	26.92%	29,916	26.12%
TOTAL	107,130	100.00%	114,530	100.00%

Note: Primary fieldwork data (2024–2025). Values represent weighted guide-reported visitor estimates (§3.3).

4.3. Origin, residence dynamics and composition of groups

Country of origin. The weighted volume estimates suggest a perceived shift across core source markets within the certified guided channel. The DACH cluster, encompassing Germany, Austria, and Switzerland, remains a major and historically established source basin for northern Italian lake tourism (Battilani, 2009), although the three markets display different growth patterns across the weighting specifications.

The most pronounced development reflected in the key informants' accounts-is the acceleration of the US market, which registered an estimated 29.1% increase in guide-reported visitor volume under the main 50-30-20 specification. The positive direction of this change is preserved across all alternative weighting specifications reported in Tables 6b–6d. While the Italian market exhibited a modest contraction and the French market showed modest positive growth, the perceived expansion of US visitors was considerably stronger.

Specifically, informant narratives suggest that some tour operators may be reallocating itineraries from congested areas such as Lake Como towards Lake Maggiore, positioning the Borromean Gulf as an alternative destination for long-haul segments seeking landscape quality and comparative tranquillity.

Table 6a. Weighted guide-reported visitor estimates by country of origin (2024–2025): main weighting specification (50–30–20).

Origin	2024	2025	% Change	Rank 2024	Rank 2025
Germany	27,190	27,700	1.88%	1	1
United States	18,380	23,730	29.11%	2	2
France	18,220	18,840	3.40%	3	3
Italy	14,446	14,366	-0.55%	4	4
United Kingdom	7,295	7,565	3.70%	5	5
Switzerland	5,804	7,064	21.71%	6	6
Austria	5,060	6,270	23.91%	7	7
Spain	2,990	3,330	11.37%	8	8
Ireland	2,325	2,445	5.16%	10	9

Belgium	1,650	1,800	9.09%	11	10
Portugal	900	980	8.89%	12	11
Others	2,870	440	N/A*	9	12
TOTAL	107,130	114,530	6.91%		

Note: Primary fieldwork data (2024–2025). Values represent aggregate guide-reported estimates derived from the weighting protocol (§3.3) and reflect perceived channel-specific distribution. *The change in the "Others" category is not substantively interpretable as a market decline; it reflects increased classification granularity in the 2025 multi-response data capture by key informants, which reduced unclassified residual estimates.

Table 6b. Equal-weighting baseline (33–33–33; one-third per rank)

Origin	2024	2025	% Change	Rank 2024	Rank 2025
Germany	21,133	22,767	7.73%	1	1
United States	18,017	22,217	23.31%	2	2
France	15,493	16,327	5.38%	4	3
Italy	16,327	15,593	-4.50%	3	4
United Kingdom	8,783	9,650	9.87%	6	6
Switzerland	8,927	11,027	23.52%	5	5
Austria	6,567	6,967	6.09%	7	7
Spain	2,733	3,100	13.43%	9	8
Ireland	2,583	2,717	5.19%	10	9
Belgium	1,833	2,000	9.11%	11	10
Portugal	1,500	1,633	8.87%	12	11
Others	3,233	533	N/A*	8	12
TOTAL	107,130	114,530	6.91%		

Table 6c. Conservative weighting specification (40–35–25).

Origin	2024	2025	% Change	Rank 2024	Rank 2025
Germany	23,835	24,860	4.30%	1	1
United States	18,128	23,073	27.28%	2	2
France	16,992	17,452	2.71%	3	3
Italy	15,050	14,920	-0.86%	4	4
United Kingdom	8,095	8,435	4.20%	5	6
Switzerland	7,143	8,718	22.05%	6	5
Austria	6,045	7,315	21.01%	7	7
Spain	2,725	3,060	12.29%	9	8
Ireland	2,713	2,853	5.16%	10	9

Belgium	1,925	2,100	9.09%	11	10
Portugal	1,125	1,225	8.89%	12	11
Others	3,355	520	N/A*	8	12
TOTAL	107,130	114,530	6.91%		

Table 6d. Concentrated stress-test specification (60–25–15).

Origin	2024	2025	% Change	Rank 2024	Rank 2025
Germany	30,545	30,540	-0.02%	1	1
United States	18,633	24,388	30.89%	3	2
France	19,448	20,228	4.01%	2	3
Italy	13,842	13,812	-0.22%	4	4
United Kingdom	6,495	6,695	3.08%	5	5
Switzerland	4,465	5,410	21.16%	6	6
Austria	4,075	5,225	28.22%	7	7
Spain	3,255	3,600	10.60%	8	8
Ireland	1,938	2,038	5.16%	10	9
Belgium	1,375	1,500	9.09%	11	10
Portugal	675	735	8.89%	12	11
Others	2,385	360	N/A*	9	12
TOTAL	107,130	114,530	6.91%		

Note to Tables 6b–6d: Tables 6b–6d report sensitivity analyses based on three alternative weighting specifications: equal weighting (33–33–33), a conservative weighting scheme (40–35–25), and a concentrated weighting scheme (60–25–15), respectively. Alternative coefficients were applied to the first-, second-, and third-ranked countries reported by each guide prior to aggregate summation, as described in §3.3. Country-level estimates are independently rounded to whole visitors; consequently, their displayed sums may differ from the aggregate guide-reported totals by one unit.

Excursions versus overnight stays. Cross-referencing geographic origin with trip typology suggests perceived behavioural differences across visitor groups. The German market is described by informants as heavily oriented towards residential overnight stays. Crucially, qualitative accounts suggest a potential shift within the North American market: whereas US visitors were traditionally understood to favour single-day excursions, informants report that they may be extending their stay to include one or two nights (KI–30). Conversely, the Italian domestic market exhibits the most heterogeneous composition, maintaining a near-equal balance between day-trippers and residential tourists. This pattern appears to align with existing literature on domestic proximity tourism, where day-tripping behaviours typically constrain local spending (Leiper, 1990). Guides perceive residential tourists as having a higher potential for local economic impact and regional value generation (Richards, 2021).

Composition of groups. Both individual (+3.9%) and organized group (+7.0%) guided flows experienced growth during the study period, with the latter continuing to dominate the market. Informants report a strategic reduction in average DACH group size, which is reported to have contracted to a standard of 18-25 participants (KI-4). Conversely, French and Italian markets appear to remain anchored to traditional, large-scale group models encompassing 40–50 individuals. This divergence is attributed by informants to perceived economic adjustments and changing tour operator packaging in German-speaking source markets.

Table 7. Perceived distribution of individual tourists and groups across key markets, 2024–2025.

Country	% Ind. 2024	% Ind. 2025	% Gr. 2024	% Gr. 2025
Germany	12%	7%	88%	93%
United States	28%	17%	72%	83%
France	36%	5%	64%	95%
Italy	46%	15%	54%	85%
Spain	30%	0%	70%	100%
United Kingdom	17%	57%	83%	43%

Note: Data compiled from 2024–2025 fieldwork. Values represent weighted aggregate estimates provided by certified tour guides (§3.3) and reflect perceived market distribution within the guided tourism channel.

Abbreviations: Ind. = Individual tourists; Gr. = Groups.

A methodological note is warranted regarding the apparent disappearance of individual Spanish visitors and the simultaneous perceived surge in UK individual travellers (from 17% to 57%) in the 2025 dataset. The shift from approximately 30% individual Spanish travellers in 2024 to 0% in 2025 should not be interpreted as a total macro-market absence of independent Spanish tourists. Instead, it appears to reflect the specialized observational perimeter of this study. Individual Spanish tourists visiting the destination autonomously fall entirely outside this guide-based dataset. Similarly, the pronounced variations in the UK individual segment are likely influenced by the specific client portfolios and agency collaboration of the participating guides - who often receive bookings for independent travellers through travel agencies and tour operators - rather than a literal market-wide shift in visitor flows. These patterns serve as a crucial reminder that the data presented describe the specific context of reported guided tourism demand rather than total, aggregate visitor arrivals.

4.4. Determinants of site choice and the "Garden Lover" profile

During the 2024 season, approximately 89.1% of accompanied tourists visited at least one of the studied botanical properties. This proportion remained stable at 89.3% in 2025. Isola Bella (palace and garden) emerged as the most visited site. It was followed by Isola Madre (palace and garden) and the botanical gardens of Villa Taranto. The marginal volume recorded for Villa Pallavicino does not reflect a lack of attractiveness. Instead, it indicates a distinct modality of consumption. Families and school groups, the primary target segments for this property, systematically engage in autonomous visitation rather than hiring professional guides.

This spatial and attraction hierarchy aligns with the pull factors mechanism theorised by Crompton (1979). At the same time, Isola Madre's strong appeal to British travellers illustrates how reputed heritage value and aesthetic appreciation are intrinsically mediated by the visitor's specific cultural background (Palmer & Tivers, 2019).

The analysis of motivations reported by informants uncovers an evolving visitor profile. While curiosity and botanical passion remain the baseline drivers, values related to wellness and psychophysical regeneration are described as increasingly prominent (Benfield, 2021). The renewed interest in historic gardens and parks, partly rediscovered during and after the pandemic, reflects an apparent growing demand for environments that combine aesthetic enjoyment with physical and mental well-being and the dissemination of environmental values (Dell'Era, 2022). What distinguishes the emerging "Garden Lover" profile is a perceived simultaneous demand for cognitive-aesthetic stimulation and psychophysical restoration (KI-20). This dual motivation positions the historic garden within the broader competitive landscape of nature-based tourism while preserving its specific cultural and botanical identity. Seasonality trends highlighted by the guides reveal an operational peak during the spring quarter (March to May), aligned with the flowering of camellias, magnolias, azaleas, rhododendrons and tulips. Autumn is also reported to be gaining relevance through foliage tourism, suggesting potential pathways toward deseasonalisation through slower, more contemplative tourism modalities (Connell, 2004; Oliveira Paiva et al., 2020).

4.5. Post-pandemic changes in behaviour and guide loyalty.

The COVID-19 pandemic functioned as an institutional catalyst. According to informant accounts, this crisis accelerated demand for botanical gardens (KI-28), which are increasingly sought after as controlled, low-density open-air environments. Behavioural modifications identified by the informants are highly heterogeneous, varying significantly across age brackets and nationalities. Informants note that contemporary tourists appear to travel with greater frequency. This trend is described and partially triggered by an existential awareness that disruptive global events may recur. Consequently, visitors are understood to increasingly seek longer, less compressed destination experiences. At the same time, informants report that travellers exhibit a higher dependency on mobile technology during guided routes. This includes extensive social media recording and photography. These digital actions can induce structural pacing friction, causing distracted participants to fall behind the organized flow (KI-12). Furthermore, travellers display reduced patience regarding queuing or service friction, alongside a perceived reallocation of discretionary spending towards premium enogastronomic and experiential quality rather than traditional souvenirs. These field observations are highly consistent with contemporary post-crisis tourism frameworks (Aschauer & Egger, 2023; Richards, 2021).

The relational loyalty dynamic highlighted in the DACH segment constitutes a notable qualitative finding emerging from key informant interviews. German-speaking travel agencies and tour operators frequently request the same professional guide across successive tours (KI-4). This pattern fosters a distinct relational loyalty that informants view as extending beyond the intrinsic appeal of individual heritage sites. Instead, this dynamic operates heavily at the inter-organisational level, anchoring itself within the long-term relational capital established between foreign travel agencies and local frontline professionals.

The fieldwork data reveal a structural segmentation within the destination's supply chain, operating on two distinct operational planes. On the first plane - which defines the core dataset of this

study - intermediaries secure independent, certified local guides for multi-day itineraries to guarantee interpretive depth. Conversely, procurement of site admissions is handled separately via the properties' digital portals (KI-7). On the second plane, a competing transactional track emerges where other operators and independent visitors completely bypass external professionals. These actors purchase bundled 'admission plus internal guide' services directly from the heritage sites' proprietary platforms (KI-7). This dual-track structure helps contextualize the demographic and volume shifts reported across segments: while high-value, relationship-driven group flows remain anchored to independent frontline expertise, standardized and transactional flows appear to be increasingly absorbed by the venues' internal guiding structures.

From a theoretical perspective, these observations provide material that can be interpreted through the VRIO framework (Barney, 1991) but they do not constitute direct proof of sustained competitive advantage. As illustrated by informants' accounts, the deep territorial embeddedness and historical trust established by certified guides represent intangible resources that are difficult to replicate through digitized alternatives or non-local personnel. This interpretation remains exploratory and should therefore be read as a conceptual positioning rather than as a tested strategic-performance relationship.

4.6. Operational criticalities

Informants widely identified a structural mismatch between the premium quality of the destination's intangible interpretive offer and the inadequacy of its physical infrastructure (KI-15). Severe operational bottlenecks include architectural barriers, a lack of specialized mobility aids, poor navigational signage, and insufficient rest areas within the perimeters of the heritage sites. For a guided market noted by practitioners to be heavily composed of senior travellers aged 65 and above, physical accessibility cannot be managed as an ancillary service. Instead, accessibility represents a mandatory prerequisite for basic safety and customer satisfaction.

When analyzed through the Resource-Based View (RBV) lens, these material deficiencies highlight constraints within the organisation dimension of the framework, as synthesized in Table 1. These infrastructural gaps act as a strategic bottleneck that may prevent the destination from fully exploiting and capturing the economic value generated by its frontline human resources. Notably, no structural complaints regarding accessibility were reported by North American tourists within the informant accounts. This absence should be interpreted cautiously: it may reflect differences in expectations, differences in reporting behaviour, or the specific composition of the guided groups observed, rather than a verified absence of accessibility problems for that segment.

5. Discussion

5.1. Theoretical contribution

Three distinct theoretical contributions emerge from this empirical investigation. The first and primary contribution is methodological. The volume-based weighting protocol transforms qualitative key informant assessments into a volume-adjusted representation of informant perceptions. This approach challenges the implicit equivalence assumption in traditional unweighted aggregation. Furthermore, it offers a replicable template for niche tourism research where direct visitor surveying is logistically constrained, without claiming to substitute objective macro-statistical data. Rather than

serving as a replacement for official statistics, this approach establishes a complementary exploratory intelligence mechanism. It provides structured insights into niche channels where aggregate destination arrivals lack granularity at the attraction level or fail to capture specific motivational drivers.

The second contribution is conceptual. This study illustrates how qualitative empirical indications can be fruitfully interpreted through the conceptual lens of the Resource-Based View (RBV) and VRIO framework (Barney, 1991), rather than attempting to quantitatively test or formally validate VRIO propositions. The behavioural dynamics reported in the DACH segment provide exploratory evidence consistent with this interpretative framework.

Above all, systematic repeat requests from international intermediaries for the same local professionals suggest that structured relational capital can actively condition distribution channels. This mechanism highlights a perceived insulation effect within supply chain segmentation. Despite the availability of competing transactional tracks managed directly by heritage properties, premium international agencies willingly split their procurement. Specifically, they hire preferred external human capital for the overall tour while purchasing admissions separately online. Interpretatively, this suggests that interpretive competence may represent a resource of potential strategic relevance, helping insulate independent professionals from standard vertical integration by heritage attractions.

The third contribution is empirical, offering an updated demand profile of Italian garden tourism for the 2024–2025 period within the certified guided channel.

This analysis documents the emergence of wellness as a complementary push factor alongside traditional cultural driver. It also highlights the structural expansion of North American flows within guided tours. Informants perceive this trend to be partly associated with potential itinerary reallocation by international tour operators away from congested areas such as Lake Como, though this remains an observational hypothesis rather than a demonstrated market-wide substitution. Finally, the analysis captures the reported behavioural profile of the senior female Garden Club visitor.

5.2. Managerial implications

Four core operational implications for destination management follow from these findings. First, from a supply-chain perspective, destination intermediaries and local Destination Management Organisations (DMOs) should structurally integrate specialized interpretive competence into their quality-control frameworks. Frontline service delivery directly impacts visitor satisfaction and repeat visitation. Therefore, stabilizing the standard of local field interpretation is critical for maintaining destination consistency. Utilizing certified guides as structured sources of qualitative market intelligence allows DMOs to establish an early-warning mechanism for tracking shifting visitor profiles that official arrival metrics typically miss.

Second, the prominence of senior female visitors (aged over 65) within perceived incoming flows highlights potential priorities for destination management (Alén et al., 2016). Key informants perceive this group as having high discretionary spending capacity and a strong inclination toward slow-tourism experiences. Consequently, improving physical accessibility and infrastructure becomes essential to fully accommodate this high-value segment. Minimizing the material access bottlenecks documented in §4.6 – specifically through physical mobility aids, designated rest areas, and standardized multilingual signage – must be an operational priority. Removing these physical barriers directly mitigates customer friction and optimizes long-term destination loyalty.

Third, targeted communication strategies are needed. While both the resilient DACH segment and the growing North American market rely heavily on pre-arranged itineraries, this pattern is reinforced by the perceived reallocation of operator routes from neighboring destinations such as Lake Como. Consequently, marketing operations must target international tour operators, agency partners, and television content producers. Because these premium operators handle guide procurement separately from digital ticketing channels to secure top-tier independent expertise, local DMOs should structurally support this relational B2B channel. DMOs should provide international corporate partners with rich, regularly updated content packages, including detailed botanical calendars and professional resource profiles of local licensed guides. This support helps defend this high-yield, independent group segment against shifts toward more standardized, internal venue-driven options. Across all segments, effective communication should be anchored in the seasonal and botanical identity of the sites rather than generic nature-and-relaxation messaging. Fourth, the accelerating appeal of autumn foliage presents a promising operational pathway toward deseasonalization. This opportunity is further supported by the unique micro-climatic botanical calendar of the study sites. Key examples include the extended winter flowering of *Camellia sasanqua* (October through March) and *Camellia sinensis* (October–November) (Ferrario and Dell’Era, 2026). However, capitalizing on this operational window strictly requires coordinated calendar alignment with local accommodation providers. Currently, seasonal hotel closures mirror and artificially constrain the operational windows of the botanical attractions.

5.3. Outlook for future years

Key informants express qualitative expectations regarding the potential emergence of Eastern European source markets, specifically Bulgaria, Romania, Poland, and Greece. This shift is perceived by participants as representing a possible novelty in the composition of garden tourism demand on Lake Maggiore, with incoming flows expected to arrive predominantly in large group formats.

Concurrently, DACH leadership is expected by practitioners to persist, albeit alongside a progressive reduction in average group sizes. Meanwhile, North American visitor flows are perceived to maintain sustained momentum within guided itineraries. Finally, key informants report preliminary expectations regarding initial arrivals from India and broader Asian markets. In line with the exploratory design of this study, these projections represent subjective informant expectations rather than econometric demand forecasts.

Nevertheless, these qualitative indications suggest that garden tourism on Lake Maggiore may be entering a phase of geographic diversification. This evolution will require destination managers to balance the consolidation of established segments with necessary operational adaptations to evolving visitor flows.

6. Conclusions, limitations, and future research

6.1 Summary of core findings

This study examined the evolution of visitor profiles, motivations and behaviours in garden

tourism on Lake Maggiore across the 2024–2025 period, employing certified tourist guides as key informants. To ensure analytical clarity, the findings of this study are distinguished across three complementary levels.

First, regarding what the study shows within the guided-channel dataset, the findings show that certified tour guides possess structured experiential knowledge capable of offering a detailed, volume-adjusted qualitative representation of visitor composition, group dynamics, and perceived post-pandemic changes within guided channels. This represents the study's primary methodological contribution: a replicable, volume-weighted key informant protocol for niche tourism contexts that offers a complementary intelligence mechanism for niche destinations lacking official attraction-level visitor data. Overall, the aggregated estimates provided by key informants indicate an exploratory expansion of 6.9% in guide-reported visitor volume between the two seasons, with wellness progressively emerging as a complementary push factor alongside traditional cultural and aesthetic drivers. The Reflexive Thematic Analysis identified five overarching themes structuring the qualitative evidence: structural shift in international source markets; demographic consolidation of the guided visitor profile; post-pandemic motivational transformation; destination physical infrastructure and spatial accessibility; and visitor behavioural individualisation. Furthermore, the findings consistently indicate the perceived demographic dominance of a senior segment (aged over 65) with a strong female component, perceived by key informants to possess high discretionary spending capacity and a preference for slow, in-depth engagement.

Second, regarding what the study suggests, the findings indicate that this frontline professional knowledge can serve as a valuable complementary exploratory intelligence mechanism for destination monitoring, particularly in niche contexts where official visitor data lack granularity at the attraction level. From a conceptual perspective, applying the Resource-Based View (RBV) and VRIO framework as an interpretative lens suggests that localized interpretive competence and relational loyalty channels may represent resources of potential strategic relevance for destination competitiveness, particularly in stabilizing premium B2B distribution networks as perceived by informants.

Third, regarding what remains an observational hypothesis, specific dynamics – such as the perceived shift of North American group itineraries from Lake Como toward Lake Maggiore or preliminary expectations regarding emerging Asian and Eastern European markets – represent informant perceptions and observational hypotheses that require further empirical validation through direct market-wide survey data.

6.2 Limitations of the study

Four main limitations should be noted. First, the primary constraint is the qualitative and exploratory nature of the study, which relies on guide-reported volume estimates rather than direct, visitor-level survey measurements. While the volume-weighting protocol mitigates the equal-informant assumption, it remains a complementary qualitative intelligence mechanism rather than a macro-statistical census tool. Second, the geographical concentration on the Borromean Gulf limits direct generalisability, although the area's status as an internationally recognized garden tourism destination offers transferable insights for comparable niche heritage sites. Third, the 2024–2025 observation window captures a phase of post-pandemic consolidation in which some market trends may not yet have stabilized. Fourth, the study structurally underrepresents visitors under the age of 45 because their preference for autonomous heritage consumption places many of them outside the guide-

based observational perimeter.

6.3 Future research directions

These boundaries clear a path for four future research avenues. First, future research should integrate the key informant protocol with a direct quantitative survey administered to visitors at site entry and/or exit points. This approach will enable data triangulation and capture demographic segments currently outside the observational perimeter. Second, the guide loyalty dynamic in the DACH segment warrants dedicated exploration, ideally via a mixed-methods design combining guide interviews with direct visitor tracking across successive tours. Third, the replication of the weighted key informant protocol in comparable niche heritage destinations - both within Italy and internationally - would test the transferability of the methodological framework and contribute to its validation as a replicable tool for niche tourism demand monitoring. Finally, the infrastructural and behavioural dimensions identified in this study – specifically the physical accessibility gaps documented across heritage garden sites and the emerging individualisation of visitor behaviour – warrant systematic investigation through dedicated on-site observational studies and visitor satisfaction surveys, to inform targeted destination management interventions.

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Conflict of interest

The author declares no financial, commercial, or personal conflicts of interest that could inappropriately influence or bias the outcomes of this study. While the author maintains an established professional background within the regional tourism context, data collection and analysis were conducted independently and subject to the methodological safeguards outlined in the manuscript. No key informant held an employment or hierarchical relationship with the author at the time of data collection.

Appendix A

Semi-structured interview guide for key informants in Borromean Gulf, Lake Maggiore garden tourism.

Tour guide survey 2024/2025

Introductory Note. The following protocol was administered to 31 certified tour guides operating in the Verbano-Cusio-Ossola Province (Lake Maggiore area, Italy). Interviews were conducted individually, either in person or via telephone, between November and December 2025, upon

completion of the 2025 tourist season. Each guide provided formal informed consent prior to participation. Responses were not audio-recorded to maximize informant spontaneity. Instead, structured field notes were compiled in real time and expanded immediately following each interview session.

Section A - Professional profile and market volume

Q1. How many years have you been operating as a certified tour guide within this region?

Q2. Approximately how many tourists have you accompanied per season within the study area? (Please specify the exact volume for 2024, 2025, and the expected forecast for coming years).

Section B - Gardens: demand, site choice, and motivations

Q3. What percentage of the tourists you accompanied integrated a garden visit into their itinerary across the 2024 and 2025 seasons? Please specify any overarching motivation if applicable.

Q4. Which specific historic or botanical gardens were most frequently selected by your clients in 2024 and 2025? Please indicate the primary drivers behind these choices.

Q5. Based on your professional interactions, what approximate percentage of your clients can be classified as regular or dedicated garden visitors (2024 versus 2025)?

Q6. Based on your clients' accounts, what was the primary motivation for visiting the gardens across both seasons? Please identify the prevailing visitor typology among the following options:

Specialist visitor (*e.g., gardener, landscape architect, nursery worker*)

Aesthetic passion for gardens

General curiosity

Wellness and psychophysical restoration

Leisure and outdoor recreation

Inspiration for personal horticultural or gardening projects

Other (*please specify*)

Q7. Based on your clients' testimonies, how frequently do they visit a botanical or historic garden in a given year (Once a month or more, A few times a year, or once a year)?

Q8. What was the preferred period or month for garden visits across both seasons? What were the primary botanical or environmental motivations?

Q9. How frequently do clients repeat a visit to the exact same garden property within the area, and what are the main drivers of repeat visitation?

Section C - Post-pandemic dynamics and behavioural shifts

Q10. Following the COVID-19 pandemic, have you observed a structural shift in the aggregate demand for open-air botanical and garden visits? Please specify any underlying reasons.

Q11. Have you noticed significant shifts in visitor behaviour on-site in 2024 and 2025 compared to pre-pandemic baselines? These factors may include mobile phone usage, requests for autonomous free time, attention spans during interpretation, and service friction expectations.

Section D - Demographic profile and geographic origin

Q12. Over the observed period, did your professional activity involve predominantly organized groups, independent individual tourists, or a balanced mix of both segments? (*Please specify for 2024, 2025, and the forecast trend*).

Q13. What were the primary countries of origin of your guided clients? Please list the top three target markets in order of volume for both the 2024 and 2025 seasons, including your forecast for coming years.

Q14. What age group do the tourists you accompany predominantly fall into across 2024, 2025, and future forecasts? Please identify the prevailing category among the following brackets and indicate any underlying motivations:

Under 18 years old

19-45 years old

46-65 years old

Aged over 65

Q15. Are the guided tourists predominantly male or female? Please indicate any specific drivers or motivations behind this distribution for the 2024 and 2025 seasons.

Section E - Communication channels, accommodation, and criticalities

Q16. Based on your clients' accounts, what was the main source of information or communication channel that influenced their choice of destination? (Multiple answers possible):

Television programmes and documentaries

Specialist botanical or travel magazines

Social media platforms (e.g., Instagram, TikTok)

Word of mouth and personal recommendations

Travel agencies and international tour operators

Online review and booking platforms (e.g., TripAdvisor, Booking.com)

Other (please specify)

Q17. Approximately what percentage of your guided clients came for a single day trip (excursionists) and what percentage stayed overnight (residential tourists) in regional accommodation facilities across 2024 and 2025?

Q18. Based on participant comments, complaints, or feedback, have you identified any operational criticalities, infrastructural deficiencies, or sources of dissatisfaction during garden visits across both seasons?

Section F - Outlook for coming years

Q19. In your view, what are the main anticipated changes in the coming years regarding guided demand and group composition? Potential modifications include the emergence of new geographic source markets, generational age shifts, and contractions or expansions in group sizes.

Methodological note for volume-weighted estimations: For country-of-origin data, a tiered coefficient structure was applied: 50% weight to the first ranked country, 30% to the second, and 20% to the third, calculated individually for each guide prior to aggregate summation.

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