Belfast Guided Tours Review and Analysis Executive Summary June 2012

1 Executive Summary

Belfast's appeal as vibrant city tourism destination has been supported and reinforced by the development of a range of guided tours, which explore the city's history and heritage, culture and diverse geographical districts. Belfast City Council has encouraged and supported the development of many of these guided tours, which variously contribute to the quality of visitor experiences of the city, generate footfall to cultural venues and add to the evening and week-end economy.

The Council was keen to explore the current position of guided tours in Belfast, outline the sector's needs, opportunities and challenges to cater for current and future visitors; in early 2012 the Council commissioned BTS to independently review and analyse Belfast's guided tours and produce an action plan on how to take the sector forward. Guided tour operators and stakeholders were consulted through face to face, telephone and electronic survey and Belfast benchmarked against guided tour developments in Dublin, Edinburgh, Glasgow, Cardiff, Bilbao and Rotterdam.

Guided Tours

In total, 58[1] guided tours were identified operating in Belfast, illustrating the depth and diversity of the product on offer. The mapping of tours highlights that walking tours, bus tours and taxi tours are the primary tour activity catered for visitors.

Belfast City Council Tourism, Culture and Arts currently or has supported some guided tours to develop the cultural tourism product – these include the Late Night Arts, C S Lewis, Literary, Belfast Bred, Music, Historic Pub and Historic Walking tours. The main report catalogues the tour participant numbers and revenues generated by each of these tours.

Operator and Stakeholder Views

Feedback from the consultations and business survey proved useful in understanding the importance of development funding of tours, strengths and weaknesses, opportunities and priorities for the future. Major conclusions are:

1. While development funding has been important in contributing to the growth of the cultural tourism product – and to innovation e.g. Belfast Bred - the commercial viability of some tours is questionable and would not be sustainable without Council intervention. The rationale for the Council's continuing support should be reviewed and these guided tour operators helped to commercialise, including banding together for mutual benefit (from e.g. joint marketing and sales).
2. Marketing, revenue/sales, seasonality, and not having enough visitors to generate revenues are the key challenges facing operators.
3. Some of the independent walking tours are innovative, entrepreneurial and commercial, operating without Council support. They undertake their own marketing, promotion and work collaboratively with other tourism businesses e.g. contacting and leafleting hotels independently. However, the marketing and promotion of many other guided tours is limited and there are few routes to market being exploited and limited opportunities for the visitor to purchase tickets. There needs to be greater collaboration, cross selling and marketing of the tours to increase footfall and revenues.
4. Guided tour operators are broadly optimistic that they will experience growth in 2012 – with the Titanic contributing to raised expectations. Half the operators consulted are planning new product development in 2012 as well, but there appears to be no mechanism for supporting them or for the City to capitalise (i.e. in promotional terms) on new developments.
5. The Council was important in helping initiate the Late Night Art tours, which help galleries extend their reach; some galleries integrate their exhibition programme with the tours, with one having the foresight to exhibit e.g. young artists who might not otherwise have an audience. But again more could be done to attract more visitors to the City and increase sales.
6. The high level of bus and taxi tours is good for Belfast, but some issues about quality assurance exit, to safeguard the quality of the visitor experience.

[1] Blue Badge Tour Guides and independent sightseeing tours and bus companies with several destination included in the itinerary were excluded from the analysis

Benchmarking Belfast

Guided tour developments in Dublin, Edinburgh, Glasgow, Cardiff, Bilbao and Rotterdam were looked to benchmark Belfast and see what lessons could be learnt. The report provides a summary table for each city. While there is some public support for a small number of tours, most is provided either through competitive funding (by application) or collaborative marketing. These destinations are big enough for most tours to be self sustaining commercially.

Opportunities were identified for Belfast: - ghost tours and venue tours (e.g. Scottish Parliament, Cardiff Millennium Stadium). Belfast does well in the "tours by locals" especially through the taxi tours. But the opportunities for cross-selling between operators, and active marketing collaboration are also not well developed in some of these benchmark cites. There is also limited evidence of commercial sponsorship for guided tours.

Recommendations

The research and consultation processes brought out a number of issues which need addressed if the potential for the guided tours sector to contribute to Belfast's tourism product is to be fully realised. Council support has been pivotal to the success of many of the guided tours to date, but this support, if it continues to be available, should be used to help start-ups and product development and not for continuous subsidy.

There's plenty of anecdotal evidence that satisfaction levels are high which is good for positive word of mouth and referral, as evidenced by e.g. Trip Advisor and the galleries' continuing engagement. Some elements of the guided tours product are well developed, others have significant potential to be developed and are ideally placed to benefit from current trends towards greater interest in experiential tourism and a stronger visitor desire for authenticity.

The main challenges are:

1. To make it easier for visitors to identify what Belfast has to offer (in terms of tours); how this will add to their appreciation of the City and to find and book tours easily. It's then up to the guides to offer the compelling, positive experience. So, marketing, promotion and selling are central to the recommendations.
2. Business development and acquisition of business skills amongst some guides and operators is important – to help them market and sell effectively and to help them make the tours sustainable in the long term.
3. Quality assurance is not, we think, as substantive issue - because visitor reactions are overwhelmingly positive. But QA penetration and uptake amongst operators is a sign of maturity and effective business management and will be a more effective marketing tool, while also helping ensure that rogue operators are discouraged.

Some of these challenges can be addressed co-operatively (e.g. joint marketing), but the pivotal role of the Council should be to focus on product development, innovation, marketing and business development. The full report includes a detailed 3 year Action Plan. Priorities in the next 12 months are:

1. BCC to adopt a catalytic role to developing new guided tours/ tourism products.
2. Establish an industry-led guided tours action group with representatives from the sector to drive actions forward.
3. Workshops to help independent tour guide operators collaborate and work more closely together.
4. Explore their interest and appetite to develop the suite of tours as an independent private sector led initiative.
5. Develop a business development programme to help guided tours commercialise, especially for Belfast Bred.
6. Bring local stakeholders in emerging City destinations together for product development and to avoid duplication and competition.
7. Help guided tour operators to market more effectively together and with accommodation sector.
8. Scope out the opportunity for Smartphone applications to help visitors orientate themselves and especially to help the night time economy.

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