

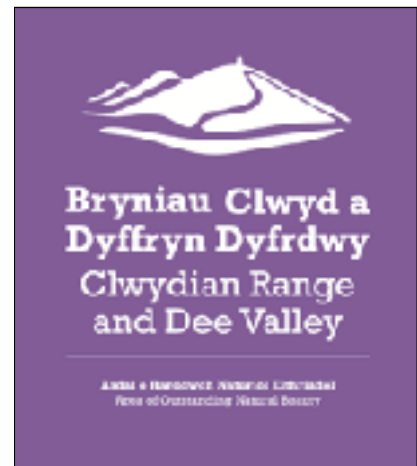


Dee Valley Active

Outdoor Activity Providers Project

The Feasibility of a Cohesive Point of Sale

Final Report: March 2017



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Executive Summary

This project was to undertake a feasibility study about providing a point-of-sale (PoS) facility for Dee Valley Active (DVA), which is a fairly new grouping of outdoor activity providers in the Dee Valley in North Wales, primarily focused around the town of Llangollen and mainly offering water based outdoor activities on the River Dee. A secondary focus of the work was to facilitate a closer working between the Llangollen Tourist Information Centre (TIC) and DVA.

The over arching purposes of the project were to assist DVA in growing new business for its members, to raise the overall outdoor activity profile of the Dee Valley and to compete better with the increasing 'adventure tourism' pull of Snowdonia to the west of the Dee Valley.

Dee Valleys activity providers, natural resources and tourism assets are well placed to complement and work with other business's and stakeholders from the regional Snowdonia and North Wales adventure tourism offer, and vice versa. Joined up thinking across North Wales could lead to longer stays and better economic impact for all.

Cartwright Associates were appointed to undertake the work. The methodology undertaken comprised:

- Research into the current best practice of point-of-sale facilities
- Extensive consultation with DVA, the TIC and other key stakeholders
- A full costed options appraisal
- A demonstration point-of-sale website suitable for DVA business's
- A recommendation to proceed both in terms of the point-of-sale facility and with improved bookability for the TIC

DVA have chosen to proceed with the recommendations and the report concludes with a list of next steps, which will take the project through the 2017 tourism season.

1. Introduction

Client Brief

The aim/purpose of this feasibility study is to research and test a new innovative booking system for the outdoor activity providers in the Dee Valley. It is envisaged that other partnership groups, such as accommodation providers and catering establishments could also benefit from the point of sale technology.

The feasibility study will aim to develop a PoS system for demonstration purposes only. If the feasibility concludes that the system is viable the longer-term aim is to develop a fully integrated system, which will offer a single point of contact for visitors and residents.

The aim is to develop a fair and inclusive system that works in real time and will incorporate the booking system, web publication and administration into one single system.

The key objectives to ensuring a comprehensive feasibility study is carried out include:

- i) Achieving an inclusive consultation, to ensure all stakeholders are engaged with the feasibility study.*
- ii) An assessment into the suitable siting of the Point of Sale system, being mindful that with constraining budgets Tourist Information Centres (TIC) are at risk of closure. Whilst the Llangollen TIC is a prime location the study should consider the potential for other locations for a Point of Sale.*
- iii) Developing a system that is fit for purpose.*

Task

Consultants are expected to achieve the following tasks to ensure the objectives are met:

- 1. To consult face-to-face with the key stakeholders and partners (a minimum of two occasions) to discuss ideas and requirements to be included in the system. The consultant must issue an open call to outdoor sector businesses in the Dee Valley to ensure inclusivity.*
- 2. To research existing point of sale booking systems and tailor to local needs by providing a SWOT analysis.*
- 3. To investigate suitable venues to host the point of sale system, as stated in 4.1 (ii) above. In addition the consultant will be required to consider the size of the technical infrastructure on which the software will be housed e.g. a tablet will differ in size to a touch screen kiosk.*
- 4. To accurately identify the most appropriate, innovative booking system via desktop research. Alternatively, a bespoke system is worth considering if deemed suitable. Consultants will be expected to provide a report which provides independent and objective recommendations which will inform decisions.*
- 5. To develop a demonstration Point of Sale system to test the concept of the preferred software.*
- 6. To hold a workshop with key partners and stakeholders to ensure the functionality of the system meets agreed specifications.*
- 7. To produce a sustainable development plan for the Point of Sale; this will be a written plan for Point of Sale management to identify the following:*
 - Costs to implement the system, particularly how the project will be self-supporting after the initial development phase. It is imperative that a three year running costs projection is included to assist project partners in planning for the implementation stage.*

- *Management & Administration: to ensure the sustainability of the project post feasibility a clear plan on how who will manage the system and maintain the online presence over the long-term is required.*
- *Hosting: the feasibility will need to consider the best location for the Point of Sale to be sited. It would also be practical to consider a contingency should the preferred site become unavailable.*
- *Commission percentages: a clear understanding to who will benefit from any commission generated from the system and a formal agreement to whether any/all commission is to be reinvested.*
- *Business investment: the sustainable plan will need to identify if any third party investment post feasibility stage is required.*
- *Legal issues: to identify any legal and/or contractual obligations of the Point of Sale system post feasibility stage.*

Outputs

The following final outputs will be required:

A detailed description of the issue that any ensuing proposal is expected to address, with particular reference to the actual or potential stakeholders and their requirements. It must also show the applicant's current position in relation to the issue and what they are anticipated to do at the conclusion of the project

- *Details of the action to be taken under the proposal, including all items for which grant will be sought*
- *Why the action is needed in the business, organisation or sector concerned*
- *An explanation of the benefits of the proposal, particularly in the long-term*
- *In the case of a proposed new business or organisation, why existing structures cannot be utilised*
- *A three-year forward cash flow projection for the proposal, showing how it will be implemented and funded*
- *A three-year forward business plan for the proposal*
- *A clear recommendation on the likely viability of the project.*

2. Dee Valley Active

Dee Valley Active

Dee Valley Active is a cluster of around 15 outdoor activity operators working together as Dee Valley Active, in association with the Clwydian Range and Dee Valley Area of Outstanding Natural Beauty (AONB) Team. They are a local community forum for the promotion of Outdoor Adventure Tourism to the Dee Valley area in North Wales, formed in 2013. The adventure activities are largely water based on or around the River Dee (kayaking, rafting, white water, body boating, stand up paddle boarding etc...) but also include (but not limited too) land based activities such as cycle hire, bush craft, foraging, guided walks, off roading etc...

The group has expressed a desire to pilot working together more closely and a desire for a dedicated PoS website, which has led to this project. The reason for this is that the group recognises that they are competing with other destinations, especially Snowdonia to the West, and that they are also competing with all of the other tourism attractions and activities that are on offer in the Dee Valley. Overall they want to increase their market share externally and internally, creating new opportunities to work as part of a regional offer alongside other business's in the Snowdonia and North Wales region.

Dee Valley and the AONB Vision:

"A leading area for sustainable tourism in Wales"

In 2020 The Clwydian Range and Dee Valley AONB is:

"An area that stands out as an exceptional place to visit in Wales for its countryside experiences and heritage interest, not only for day trips but also for short breaks and holidays. Tourism businesses are performing well and delivering jobs for local people. They are working together to deliver a quality visitor experience, supported by well managed facilities, amenities and services. Negative impacts on the environment are minimised and there is positive interaction between visitors and local communities. There is a good understanding of the area's special qualities and of the benefits brought by tourism."

Outdoor Activities

This commission / report is an action generated from on going work that the AONB is taking forward with Denbighshire County Council and Cadwyn Clwyd. Funding for this report was provided jointly from Cadwyn Clwyd and Denbighshire County Council Economic and Business Development team through the Tourism Growth Plan. The extracts below are in part extracted from the Clwydian Range and Dee Valley AONB: *Sustainable Tourism Strategy and Action Plan 2015–2020*.

A range of different outdoor activities are available across the AONB, with opportunities in the North and South.

A cluster of outdoor activity operators based in Llangollen are able to offer a variety of experiences based in and around the Dee Valley. Activities available include a number of water-based activities (open canoeing, kayaking, paddle boarding, whitewater rafting, tubing, gorge walking) taking advantage of the range of conditions on the River Dee and Llangollen Canal, up-stream and down-stream of Llangollen. Climbing and abseiling can also be offered in the immediate area. Good access to Llyn Tegid and Snowdonia increases the range of opportunities on offer. Other activities such as paragliding, paint balling, high ropes, bush craft and archery, are available on an ad-hoc basis in and around the AONB.

Operators have come together in the Dee Valley Outdoor Providers Group, with support from the AONB and with established links to Snowdonia Active and North Wales Environmental Outdoor Charter Group. Dee Valley Active is the promotional face of the group, which has branded the Dee Valley as 'North Wales Most Active Valley'. In November 2013, Festival of Llangollen Outdoor Sports (FLOI) was staged to showcase the Dee Valley, offering visitors taster sessions in activities such as mountain biking and kayaking. The AONB is working with the operators to improve their knowledge of the local environment and heritage, for management reasons and to enable them to add value to the experience they offer. This leads to a qualification and badge as an official AONB Guide.

3. Llangollen TIC

Overview

There is one fully serviced and networked Tourist Information Centre (TIC), in Llangollen. This TIC is part of the TIC pan Wales network run by Visit Wales. Denbighshire CC funds the TIC but it is run and managed by North Wales Tourism, the private sector membership organisation which undertakes marketing and destination management. The TIC carries a range of information about the AONB, it is a relatively busy TIC. In the year to April 2014 it handled 119, 947 enquiries, of which 103,535 were face to face. Currently the TIC does not have a close working relationship with the majority of activity tourism businesses in Llangollen. However there is a policy desire for this to change (see below) and our discussions with the TIC and the activity tourism businesses indicate that there is willingness from all parties to begin to work together more closely.

In terms of this project, there is an opportunity for the TIC to generate an income and additional sales for the local adventure tourism business, thereby increasing its income, improving the overall tourism offer of the region and enhancing the overall tourism profile. This project was tasked with exploring the issue with both the TIC and the adventure tourism providers to determine a mutually agreed way forward. The remainder of this chapter lays out the views of the TIC, strategy documents, management and staff with regards to issues and opportunities required to generate a successful outcome.

Tourist Information Centre - Strategic References

The “Clwydian Range and Dee Valley AONB: Sustainable Tourism Strategy and Action Plan 2015–2020” identifies:

“A key to the strategic use of information to influence visits is to make sure it is provided prominently in places where it can intercept large volumes of visitors. Tourist Information Centres still have a strong role to play, but a number have closed and the future of the network is uncertain. Llangollen TIC is the only one actually within the AONB but is well located in the centre of town. There is an increasing need to work in partnership with commercial outlets”.

Actions include:

- *Strengthening the coverage of the AONB within Llangollen TIC, through enhancing displays, regular contact with information staff, feeding news and material to them, etc.*
- *Maintaining AONB information coverage in surrounding TICs and in identified key outlets in the market towns*
- *Establishing a linked network of key AONB information outlets on major through routes, including working in partnership with a selected number of commercial retail operators in strategic locations*
- *Ensuring that all the main visitor attractions and key sites carry AONB information.*

The Action Plan identifies Llangollen TIC as a Key Agency to assist in the delivery of the priorities and actions generated in its 5 year action plan. Actions identified include:

1. *Maintain and actively distribute key AONB print*
2. *Strengthen delivery of information about the AONB at key gateways and other strategic sites*
3. *Make more of events, year round, that provide an experience of the AONB*
4. *Strengthen links between the AONB and gateway towns*

Consultation with the TIC Management and Staff

Notes from meeting with Gill Owens Llangollen TIC Manager - North Wales Tourism Company (NWT), on 2nd December 2016.

1. *Issue of activity booking at Llangollen TIC came up in early autumn in discussions with David Shiel.*
2. *What is required is an easy to use system for TIC staff, similar to what they have with the canal boat trips, where they can see inventory on line and then phone to make a booking.*
3. *The Llangollen TIC staff currently have no relationship with Pro Adventure (in the process of being re-named to Llangollen Outdoors).*
4. *Would want a 10% commission*
5. *Would be happy to showcase activities, possibly through video screen or banners.*
6. *Showcase in TIC with more visibility for whole AONB, perhaps a vinyl wall banner or kit.*
7. *Booking could be made at the main desk.*
8. *Wi-Fi on site, often fails.*
9. *Gill Owens would love a 3D model of area, as the Llangollen TIC is becoming the gateway for North Wales*
10. *TIC future is probably okay. VW looking at other models. Toilets are important but direct to public toilets around the corner*
11. *In terms of demand, people ask for walking (Dinas Bran and Aqueduct) and cycling (hire), never canoeing in Gill Owens experience.*
12. *TIC does sell Llangollen International Music Eisteddfod tickets.*
13. *In terms of other products, the canals trips were approached by the TIC and canal trip over the aqueduct do sell, but are sold out in summer, limiting the opportunity for the TIC. £8000 in sales in 2016. The Railway does not engage.*

Q&A with TIC Staff

1. How many enquiries for outdoor activities do you get in an average week and what activities are they for?
 - *Walking on a daily basis*
 - *Biking/Cycling (more road than mountain) getting more popular*
 - *Canoeing (where to? is the most popular)*
2. In order to promote and sell outdoor activities, especially water based ones on the River Dee, what would be required in terms of:
 - a) *Training for you*
 - *We would need to know a lot more about each individual activity to be able to promote and sell.*
 - *First hand knowledge and experience is extremely advantageous to ourselves and the customer.*
 - b) *Promotion within the TIC building*
 - *This is a decision for the managers*
 - c) *Anything else*
 - *We would need to be updated on a regular daily basis regarding availability, as the majority of enquires we get are from on the day customers wanting to book there and then.*
3. If there was a bookable website you could log onto to check availability and book as an agent, what would like to see it included and what would you not like to see?
 - *As above we would like to be able to book on the day and be simple to use.*

4. Consultations with DVA

Consultation

Invitations to attend a consultation workshop at the Pavilion in Llangollen to be held on the 21st of November 2016, were sent out to all members of Dee Valley Active (listed below) along with follow up phone calls and the invitation being posted on their Facebook page.

Consultees		
Cycles 2 Go	Communication Learning Development	The Sun Trevor
White Water Active	Stand Up Paddle Board UK	Wild Bushcraft Company
Llangollen Outdoors	Pro Adventure	Safe & Sound Outdoors
Body Boating	Tŷ Nant Outdoors	Tommy Davies
One Planet Adventure	Trek Smart	Getafix
Wide Horizons		

Apologies were received from 5 activity providers, with 6 attendees on the evening. Attendees on the evening included:

- **Project Sponsor:** David Shiel - AONB Senior Countryside Officer - Clwydian Range and Dee Valley AONB
Ceri Lloyd - AONB Sustainable Development Officer - Clwydian Range and Dee Valley AONB
- **Project Funder:** Donna Hughes - Business Partnerships Officer - Cadwyn Clwyd
- **Project Consultants:** Jim Embrey and Arran Cartwright / Cartwright Associates
- **Activity Providers:** Craig Forde / Safe and Sound Outdoors (SAS Outdoors)
Mike Smart / Trek Smart
Grace Williams / Body Boating / Safe & Sound Outdoors
Lianne Ing / Stand Up Paddle Board UK / Whitewater Active
Josh O'Brien / Llangollen Outdoors / Pro Adventure
- **Skills Development Project Consultant:** Catherine Williams / Snowdonia Active

Consultation Methodology

The meeting started off with a short introductory powerpoint presentation explaining the background, aims and objectives of the project and the evenings consultation exercise. Following this, a series of question sheets were handed out and worked through as a group. The collective responses from the activity providers are shown below each question asked:

1	CURRENT SITUATION		
1.1	How do you communicate / process bookings whilst working / leading an activity? Answer: <ul style="list-style-type: none">- The TIC would like to see outdoor activities as easy to book as a canal trip- Calendar / 72hr cut off- Daily response, immediate response / full time office staff and office manager (2)- Through web ticket manager platform- Spontaneous booking not very easy- Own web sites - all- 2 bookable / most telephone / pay online but no calendar		
1.2	Does it work? <i>Its worth it!</i>	Yes: Yes	No:
1.3	Is it efficient?	Yes: Yes	No:
1.4	Are the activities you currently offer bookable online?	Yes: Yes (3)	No:
1.5	Who with? Answer: <ul style="list-style-type: none">- 3rd party manager / 10% commission / 24hr / fully bookable / worth doing- Agent is Web Ticket manager- Automated booking confirmation is key		
1.6	Does it work i.e. does it generate more business?	Yes: Yes	No:
1.7	Do you use agents?	Yes: Yes	No:
1.8	What is the commission rate?	(2) 10-12% and (1) up to 20%	
1.9	Is it affordable?	Yes: Yes	No:
1.10	Is it sustainable?	Yes: Yes	No:
1.11	Do you have formal arrangements with your agents? Yes, but its a one page relatively informal	Yes: (1) Yes	No: (1) No
1.12	How do you keep track of your inventory? Answer: <ul style="list-style-type: none">- Calendar- Managed at least once per day for 30 mins (3)- Large bookings generally generate the most work on the bookings side- Input inventory via WTM- Auto updated		
1.13	How often do you update it? Answer? Daily, 1hr per day		
1.14	Does discounting for bulk purchase work in outdoor activity provision? e.g. Deal aggregators such as Groupon? Answer: <ul style="list-style-type: none">- Used to but commissions are too expensive- Short term worked for initial exposure- No (2)		
1.15	Are you comfortable with sharing data with other providers i.e activity prices available on the site?	Yes: Yes	No:
2	EXPECTATIONS		
2.1	Would you support the development of a DVA bookable website? <ul style="list-style-type: none">- Company sizes are different, one size may not fit all.- In theory yes- How the page is displayed is an issue- Mechanism i.e most active company goes to the top	Yes: Yes (all)	No:
2.2	What reason would you not support the development? Answer: None (all)		
3	OBJECTIVES		
3.1	In broad terms, what are your goals for your business over the coming year? <ul style="list-style-type: none">- Sustainable business- Generate more business / off the shoulder- Promote the sector / Dee Valley / raise the areas activity profile - Present existing opportunities better- Day visitor habits have evolved and we need to adapt too- Collectively we can achieve more- Raised visibility would be a priority		

3.2	Do you have capacity to increase business sales?	Yes: Yes	No:
3.3	Would you like to increase business sales?	Yes: Yes	No:
4	BENEFITS		
4.1	Do you need lead time on your bookings?	Yes: Yes	No:
4.2	Can you do short notice bookings of activities i.e. on spec / spontaneous purchase?	Yes: Yes (1)	No: No (2)
4.3	Do you think clustering under a DVA web site would increase sales? If so in which markets? <ul style="list-style-type: none"> - Larger markets are more appealing to target i.e. family markets, intermediate, introductory sessions - Most bookings made by women - (M) Most work comes from a holiday company / groups / through their own web site / importance of their own target market / must see themselves in the marketing 		
	Family market	Yes: Yes	No:
	Novice / introductory sessions	Yes: Yes	No:
	Women only sessions	Yes:	No:
	Youth only sessions	Yes:	No:
	Intermediate sessions	Yes: Yes	No:
	Advanced sessions	Yes:	No:
	Bespoke coached sessions 1 to 1	Yes:	No:
	Performance coaching	Yes:	No:
5	LONG TERM GOALS OF THE GROUP		
5.1	Cooperative, not for profit organisation? etc... Answer: No one objected!		
6	POTENTIAL SOLUTIONS		
EG	Bookable ecommerce website: www.lakesactivities.co.uk <ul style="list-style-type: none"> - Are TIC's sustainable and thus worth investing in? - The TIC's goals need to be understood - TIC an excellent solution if its sustainable - TIC are a business and need to make money - High commission levels are an issue - TIC's do generate footfall for outdoor activity booking - Self service system would be good - www.bikmo.co.uk example given - (DS) TIC is willing to give the outdoor sector more visibility - Would there be brand confusion? - Raised visibility would be a great start - Bureaux Des Guides concept explained 		
EG	Selling site that just gives contact details: www.outdoorni.com		
6.1	Can you name any exemplar web sites? Answer: No answers given in the session or on forms.		
6.2	Local hubs:		
	Should there be local hub locations with bespoke units i.e. tablets or kiosk? <ul style="list-style-type: none"> - TIC would work if it could book and promote - Not too keen on restaurants or in other business's 	Yes: Yes (2)	No:
	Would you be willing to reduce operating costs at the BDG TIC by sharing the staffing of the facility across the DVA members? <ul style="list-style-type: none"> - A day per month at the most - TIC should already have the knowledge! Why haven't they? 	Yes: Yes (3)	No:
	Would you consider paying into a manned (in person) bureaux des guides type outdoor activity TIC? <ul style="list-style-type: none"> - Yes if it generated a return 	Yes: Yes (3)	No:
7	WORK REQUIRED BY SUPPLIERS		

7.1	Would you be willing to update your online content weekly? - Those with websites already do	Yes: Yes	No:
8 NUMBER OF BUSINESS'S			
8.1	How many do you think there are? Answer: - Year one 7-8 - Maximum of 20		
9 NUMBER OF PRODUCTS PER BUSINESS			
9.1	What is the minimum number of product each business should have? and the maximum? - Activities first, then companies own info? - Air B&B an example? - Business logos / branding is important - Availability / calendar is key - Options to investigate 1. random 2. calendar availability generated	Min: One	Max: 10
10 VARIETY OF PRODUCTS			
10.1	Are there any types of activity that should not be included. Name: - None, members only, more the merrier, the broader the offer for the area the better		
11 LOOK AND FEEL			
11.1	What should it be? Built around DVAP logo? - DVA branding - DVA is a none biased logo - Colour was specifically chosen and is important, colours as per logo - Image heavy is good / video footage good - Randomise imagery and video		
11.2	Web site address and availability? - DVA or Dee Valley Active not secure yet - Search engine optimised		
11.3	Bilingual? - Yes, pragmatic	Yes: Yes	No:
12 MARKETING			
12.1	How would you market the website? Answer: Would you market the web site on your own web sites, silence! - Linking may not work - Promotional banners would work		
12.2	Would Google Adds be an acceptable source of income generation? - As per MBWales example, selling relevant content would be acceptable, otherwise No (2) - No (1)		
13 LEGAL SITUATION			
13.1	Contracts - SA example a logical start - 1 page contract		
13.2	Agents: see Ticket Manager example		
15 FINANCIAL STRUCTURE			
15.1	Commissions: what level? Answer: - 10% (1) - % should be related to volume of sales generated. - Under 15%, over is unsustainable - Where would the commission go - Flow chart for the commission would help		
15.2	Booking Fees? - To cover admin costs of C/C - Host costs recovered through a booking fee, e.g. £2 - Higher commission fee preferable if the customer doesn't get to see it and it works - Must avoid a 'get around or a direct booking route' - Selling at through an agent at a 'higher national level' would hide the booking fee in effect		
15.3	- Do you do it now?	Yes: ?	No:

16	E COMMERCE HOST		
16.1	Would you consider the web site be hosted by an existing commercial operator (possibly located outside of the study area) Y/N for example www.adventurenorthwales.com - Digital communities need host, principles explained - Challenges of setting up financial host - TIC / NW Tourism / Jim Jones	Yes:	No:
16.2	Are you comfortable with sharing data with other providers i.e. activity prices available on the site.	Yes: Yes	No:
16.3	Who should host the technical platform and maintenance? Answer: - Could be the same as the host		
17	3 YEAR FINANCIAL SUSTAINABILITY		
17.1	How will it be paid for? Would you be willing to be pay an annual fee? - Yes, proportional to the level of bookings generated - Through membership or commissions		
18	SPONSORSHIP		
	What do you think of site sponsorship? Answer: - OK, if relevant		
19	COSTS		
	Would you pay an additional annual administrative fee? - Yes, if it generated a sustainable level of sales		
20	EDITOR		
	Who should be the editor? Answer: ?		
21	SUMMARY AND WRAP UP		
	Vote of confidence - Yes (2) - No negative feedback received		

Second Consultation

A second consultation was held with Dee Valley Active on Wednesday 19th January 2017. The group was presented with the consultant's findings and the options appraisal found in section 7 of this report. The consultants demonstrated an exemplar activity booking website, including a draft demonstration site with Dee Valley Active branding and links to Llangollen Outdoors to show clearly how bookability could work. This website featured Web Ticket Manager.com (WTM), which several providers already work with, and highlighted their 'Box Office' option.

After discussion, it was decided that option 3 out of the 3 available was chosen. Using the event management software company to provide the point-of-sale website was Dee Valley Active's preferred option. Accordingly they asked that Web Ticket Manager be invited to present their solution at the next meeting of the group.

Consultants then asked the members to choose a sales target for the proposed PoS website for the coming year with an outlook for years two and three. It was agreed that £10,000 of new business in Year One was a realistic target and that a favourable result would see this growing by 10% in years two and three. It was also acknowledge that this would be dependent on marketing and promotion of the website, which the supporting organisations in the room promised to undertake.

Lastly, there was positive discussion about how Dee Valley Active and the Llangollen TIC could work together in the future. Talks on how this can be achieved are underway, with promotion and training being the focus. DVA members stated that they would be happy to pay the TIC a 10% commission, or agents' fee for new business.

Third Consultation

A third consultation with DVA was held on Wednesday 15th February. Web Ticket Manager presented their website and Box Office option in some detail with the demonstration website and a presentation. Dee Valley Active decided to proceed with this company, with a target date for getting the website up and running of late March, early April 2017.

Web Ticket Manager will work with the members who wish to participate in the e-commerce website to ensure their images, wording, and inventory are all complete and uploaded. All members of Dee Valley Active will be listed on the website. Those not wishing to utilise the e-commerce option will have a phone number listed so they can be bookable that way.

Denbighshire County Council will contribute to the set up cost of the website. After that the site will be maintained by members' contributions, in terms of money, and supplying imagery and written content and in maintaining accurate inventory of their products.

Timing was highlighted as key as the season begins in April and the website needs to be up before then, so that the necessary inputs can be obtained before DVA members are too busy to provide them. It was stressed that excellent imagery would be essential if the project is going to succeed, and there may be assistance available from sponsoring organisations to add to the image stock that already exists.

There was also positive news in terms of relationship building between the TIC and DVA, with training sessions booked to happen in the near future.

5. Issues

Challenges of a Co-operative PoS Website

In order to choose the best solution for Dee Valley Active it is important to identify and discuss the main challenges involved. There are several challenges about creating and sustaining any point of sale (hereafter PoS) website and some of these are harder to resolve when the ownership is shared. The list below describes the main issues, with an emphasis on co-operative websites.

Cost and Financial Sustainability

The costs of a PoS website can be split into capital and revenue, the capital cost defined as the cost of constructing the website, and the revenue cost being the cost of administering the website and the financial transactions flowing through it. To some extent, the capital cost is a fixed cost while the revenue costs are variable as they will fluctuate with the volume of traffic through the site.

As with any investment, the cost of the PoS system must be proportionate to the business it is intended to generate. The larger the investment the better the quality of the PoS website should be, the more 'bells and whistles' the website should have and it should have higher visibility on the web.

Often new organisations find both the capital and the revenue cost difficult to manage. In the case of co-operatives this can be managed by:

- A membership fee to cover the capital cost
- A 'booking fee' for each transaction to manage the revenue cost
- The use of fee-per-transaction digital plug-in provided by a technology company

In some cases, such as where the co-operative is being supported by an external organisation, the external organisation may sometimes pay the initial capital cost.

Long term financial sustainability is difficult for new organisations with niche products as it takes time to build business, and since only a small percentage of the total sale can be allocated to the PoS, the cost of this can be prohibitive in the early stages.

Financial Hosting

An e-commerce website needs an organisation who can be the financial host, through whose bank account the transactions can flow, who can ensure the supplier and any agents are paid efficiently and who can manage issues, which will mainly be about cancelled bookings requiring refunds.

In the case of one organisation PoS websites, the host is obviously the owner. Where there are multiple owners, the host can be one of the owners or an affiliate or digital/financial organisation who undertakes this role. An affiliate could be an organisation that is currently managing their own e-commerce business but has excess capacity, or it can be an organisation that undertakes this role as their main business.

If the host is one of the owners, actual or perceived conflict of interest must be carefully managed; if the host is an affiliate it will be important that performs its duties well, that it dedicates sufficient resource to the client, that it undertakes its role transparently and that it is trusted by the suppliers.

Editorial Management

At the construction stage and also occasionally during the transactional stage, there is a need to generate good editorial, both in the form of words, images and video clips. The editorial can be about the reason for the co-operative working together and also about each individual business and products offered for sale. The best way to ensure quality in each of these is to ensure they are professionally done, which incurs a management cost. In the case of co-operatives, there will be a need for an editor, who can assist the individual suppliers in the supply of their content and edit it as required to get good quality and consistency.

Product Inventory

Inventory of all goods and services being sold will need to be created on the PoS website and continually maintained in terms of adding new product. Product sold will automatically be removed from inventory by the system. Typically inventory management is the responsibility of the individual suppliers and they will want a system where they need to use and manage just one inventory control system for their whole product range.

In the case of co-operatives, where suppliers come together, they will all have their own inventory supply systems and getting them to work together can be an issue. Some destinations have avoided dealing with this issue by supplying a telephone number at the end of each product description, so prospective customers have to call through to make a booking.

Legal Liability

A co-operative PoS system will involve business, and therefore legal, relationships between the customer and the supplier of a product, the financial host of the PoS system, and any agents that may be involved in the transactions. It is important that the legal liability for the product is clearly vested only with the supplier of the product. This can be done through the agreeing by all parties of clear terms and conditions delineating the contract of sale.

Commissions

Co-operative PoS systems exist to generate additional business to that which the individual businesses are already receiving. This can involve a variable charge or 'commission,' which is levied by sales agents or the financial host for each individual sale a supplier receives. Typical percentage rates of commission vary depending on the volume of business created, on the negotiated relationship between the supplier, and on industry standards. Commissions will range from between 5% and 15% of product cost, but can go higher.

Suppliers dislike commissions generally and dislike them more the higher they are, both in terms of percentage and in terms of percentage of the total volume of their business they become.

Booking Fees

Booking fees are fees that are charged for the financial transaction and management fees of the PoS system. The percentage charge varies between typically varies between 2.5% to 5%. Booking fees are often included in the total price of the product but can also be charged as a stand-alone item. This is increasingly the case with events, such as entertainment, and has long been traditional in air travel. To date it has been resisted in destination tourism and adventure tourism.

Visibility of the Site

It is important that the site is optimised for web search engines and that it has maximum visibility for potential customers. This is achieved by incorporating the right key words into the editorial content and by frequent editorial changes to the PoS website, which will greatly enhance its visibility as web search engines are designed to give priority to sites with frequent editorial upgrades. This can be easily achieved with an ongoing series of time-limited offers and frequent posting to linked social media like Facebook and Twitter.

Co-operating While Competing

Within any business co-operative there is a built in tension between the members, because not all of them will perform at the same level. The pull for the top and bottom members will be towards the average. At the onset it is critical that all members agree the precise terms of operating the cooperative and that these are reviewed and agreed again at appropriate intervals.

Digital Security

As the media reminds us every day, the digital world is currently highly insecure. All those who are active in it can do is make themselves as secure as possible, keep that security current, and manage the risks in a pro-active manner. This is especially true of PoS systems, which, if hacked, can lead to customers' information being stolen or the whole site being held for ransom, which, in an extreme case, could lead to it being shut down. Digital security should be decision criteria in selecting how to build and maintain a PoS website.

Durability of the PoS Site

The digital world evolves with breathtaking speed. The smart phone is just a decade old in 2017 and has transformed society in that time. PoS websites as we know and use them today have been around less than 2 decades and in their current 'standard' form for less than 5 years. It is impossible to know whether today's 'standard' will stay in place for 20 years, or whether innovation will sweep it aside in the next

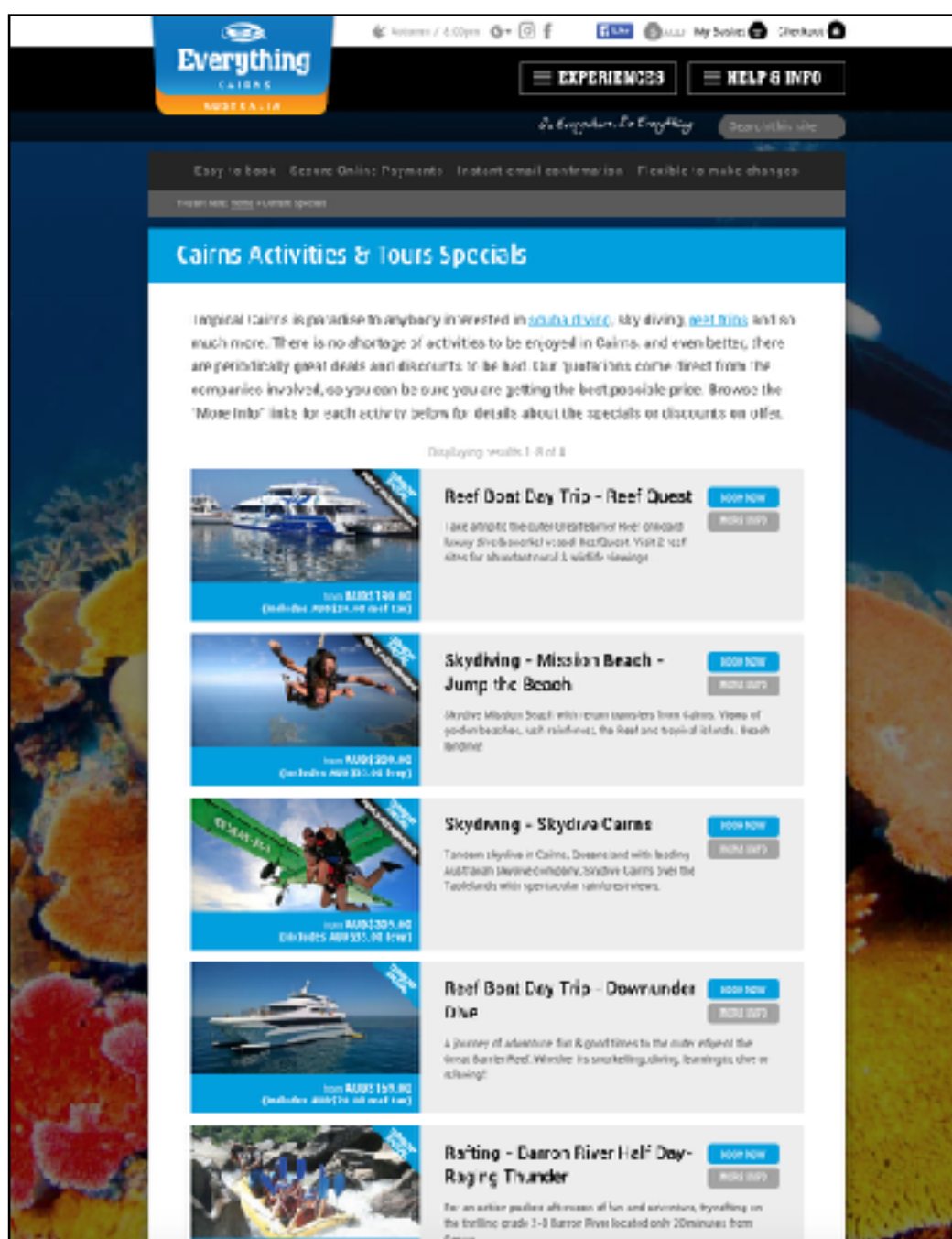
six months. The likelihood is somewhere in between, which means that additional capital investment in the next evolution will be required within the next 3 to 5 years.

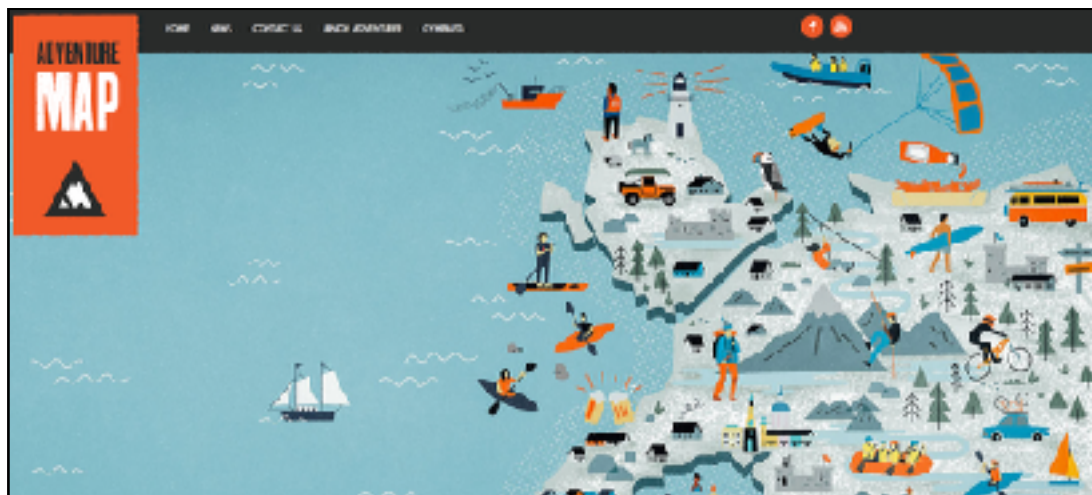
Current Standards for Point of Sales Websites

Over the last 5 years point-of-sale websites have become standardised, led by digital leaders like Amazon and Easy Jet. Today's e-commerce consumer is familiar with a home page with a series of clickable picture tiles, each of which, when clicked, leads to a full page product description, with descriptive text, more images, sometimes a video link, and clickable link to purchase.

These websites also usually contain a banner at the top with feature products, a menu down the side with other offers and links at the bottom of the page to Facebook, Twitter and other promotional social media channels.

Examples are: **Adventure North Wales Map, Northern Ireland Outdoors and Cairns Australia**





 <p>RIBRIDE</p> <p>We are Wales best adventure boat tour company</p> 	 <p>ONEPLANET ADVENTURE</p> <p>Experience the thrill of the forest</p> 	 <p>BEACON CLIMBING CENTRE</p> <p>Aweone indoor climbing including CrazyClimb</p> 
 <p>SURF SNOWDONIA</p> <p>The UK's first Wavecrafter® surfline laser</p> 	 <p>DRAGON RAIDERS ACTIVITY PARK</p> <p>Bear Gryllo Survival Academy, Seawave, Paintball</p> 	 <p>ALWAYS AIM HIGH EVENTS</p> <p>Ultimate triathlon, cycling, running and swimming challenges</p> 
 <p>FUNSPORT</p> <p>Surfing, Windsurfing and Kitesurfing tuition, hire and / or hop - Rhosneigr</p> 	 <p>PLAS Y BRENIN</p> <p>The National Mountain Sports Centre</p> 	 <p>ZIP WORLD</p> <p>#ExperienceAdventure</p> 

6. Options Appraisal

Option 1 - Do Nothing

The individual Dee Valley Active members currently undertake all their own marketing, including each having their own website, some of which are bookable online and others of which require prospective customers to telephone to make a booking. Option 1, which is 'do nothing,' would keep this status quo in place. It would mean that each individual business would continue to be as successful or not as it is now. It also means that some of the Group's stated goals of creating a stronger identity for activities in the Dee Valley and thereby competing for business better would not be achieved. However no new investment in either money or time would be required, which could be viewed as a saving.

Strengths <ul style="list-style-type: none"> - Keeps the status quo - No additional provider investment required - No additional external funding required 	Weakness <ul style="list-style-type: none"> - Does not pursue new business - Does not increase visibility of the area
Opportunities <ul style="list-style-type: none"> - None 	Threats <ul style="list-style-type: none"> - Increased competition from other more actively promoted areas could hurt individual business's

Option 2 - DVA Stand Alone PoS Website

Description

This option would see Dee Valley Active commission and operate a stand-alone PoS website featuring the area, the members of DVA and the products that the members elect to sell on the website. Examples of other similar areas that have done this are Northern Ireland, where the website is owned by the public sector on behalf of the activity providers <http://www.outdoorni.com/>, and Keswick, where a similar website is owned by a private company who makes bookings on a commercial basis with their stable of providers <http://www.keswickextreme.com/>. The 'look and feel' of both websites is similar and is, in some sense, the current standard. It is likely that a Dee Valley Active website would be similar.

The website would be constructed using templates that can be purchased from web template providers and website builder such as Wordpress, Wix, Template Monster, Themeforest and Sitebuilder. Each template provider has individual strengths and weaknesses, which need to be understood by the commissioners as they will determine the functionality of the website throughout its lifespan.

There would likely be a 'front end' template which would provide the visible website, linked with a 'back end' template which would provide and manage inventory control, editorial management and financial hosting technology. The construction of the site would be undertaken by a web-design service. It would involve a process of selecting and instructing the web designer, gathering and editing the suite of content, constructing the website, linking it to the financial host and testing, which could take a number of months.

The website will require capital investment to build and ongoing revenue support, which would come through sales income but which could also require additional investment support, especially in the initial phase. It would also require a financial host and editorial manager.

This solution would meet the aspirations of the group to extend their marketing, to compete more aggressively and grow their business.

SWOT Analysis



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Strengths <ul style="list-style-type: none"> - Owned and controlled by DVA - Creates closer working between members 	Weakness <ul style="list-style-type: none"> - Capital investment in terms of money and time required - Long start time
Opportunities <ul style="list-style-type: none"> - Can aggressively target new business 	Threats <ul style="list-style-type: none"> - No host identified - Digital security

Option 3 - DVA Solution: Using Event Management Software Provider

Description

In this option Dee Valley Active would collectively and individually contract with an event management software provider who would undertake to provide the website, inventory management and financial hosting for the co-operative, charging a booking fee plus a commission for each sale through the website.

Event Management Software, which has emerged as a mainstream digital solution in the last 5 years, allows businesses and individuals to automate much of the event/experience planning, ticketing and registration process. Examples of UK companies providing this sort of service focused on the tourism industry and activity providers are:

Web Ticket Manager	http://www.webticketmanager.com/
Digi Tickets	http://www.digitickets.co.uk/
Gateway Ticketing Systems	http://www.gatewayticketing.co.uk/

A few Dee Valley Active members have or are working with Web Ticket Manager so this solution is familiar to them. It has the benefit of providing a ready-made solution for some of the significant issues such as the finding of a financial host and the provision of a proven platform that can be plugged into, thus saving significant time. The capital cost is eliminated or greatly reduced. However, it also has the constraint of forcing participants to use the inventory management and financial hosting provided by the software, as well as pay the fee for each booking. At an initial stage, when bookings are small, the fee will not be an issue, but when the PoS website provides a high proportion of total booking for an individual business, it can become a concern.

In terms of meeting the ambition of Dee Valley Active in terms of customer visibility there is little difference. However one possible opportunity is for cross-promotion with other tourism areas and products. Since one of the potential service providers is based in Chester and has good market penetration in NW England, North Wales and London, this might be very significant.

An additional benefit, which is important, is that the digital risk is minimised.

SWOT Analysis

Strengths <ul style="list-style-type: none"> - Proven digital system - Proven business model for increasing sales - Digital security 	Weakness <ul style="list-style-type: none"> - Lack of control - Commission charges
Opportunities <ul style="list-style-type: none"> - Low capital cost - Set up is rapid - Cross selling and use of big data 	Threats <ul style="list-style-type: none"> - Potentially high ongoing revenue cost

7. Recommendation

Consultants Recommendation

In coming up with a recommendation, it is important to do so keeping in mind the original purpose of this project, which is to investigate the feasibility of creating a PoS marketing tool for Dee Valley Active, which will grow business for the individual members and assist in creating an activity tourism destination in and around Llangollen.

The next step is to evaluate which of the 3 options best provides an achievable solution, taking into account the opportunities and constraints offered by each.

In doing this the willingness of the DVA members to participate in a co-operative venture is essential, so they must make the ultimate decision.

Option 1 is the default option and will prevail only if neither option 2 or 3 is adopted.

Either Option 2 or Option 3 will provide a similar potential solution in that they will both create a web PoS site, probably with a similar 'tiled' land page look and feel, that will promote and offer for sale the products of the individual members and by doing so will promote the Dee Valley as an activity tourism destination. This will provide a sales platform fully accessible to visitor from away who are planning their visit, as well as to day visitors and those already in the Dee Valley, who will be more spontaneous in their purchasing decisions. So the opportunity is essentially the same.

The question becomes which option is the most appropriate for Dee Valley Active given where it is now as a co-operative, which is most achievable, and which best manages the risks involved.

Option 2 involves more work for the co-operative as it will have to recruit a web design company and manage the construction process of the website. This is achievable but will take longer than Option 3. Capital funding for the construction of the site will have to be found. No financial host has yet been identified, which is another significant constraint. If these issues can be overcome, the benefit for the co-operative will be that it has its own PoS website that it fully controls and the fees and commissions can be determined by the members. However the risks of digital security will also be the full responsibility of the co-operative. At this point, return on time and capital investment on the two options needs to be carefully considered.

Option 3 is the most efficient solution, requiring the least investment in terms of funding or time by the co-operative. It can also be executed quite quickly. The technology is proven, the financial host is in place and the issue of digital security is largely the responsibility of the platform operator. What is lost is full control by the co-operative. The combination booking fee and commission will be approximately 10% of every product sold. With a pilot PoS website this will be manageable initially, as the sales will probably not be large. However it could become an issue as sales through the PoS grow to a point where the total annual fee paid to the host exceeds the cost of an independent website. An additional benefit the group should consider is how effective DVA's marketing and promotional efforts will be compared to those of an established national event management software company with its cross selling opportunities and opportunities to facilitate DVA entering new markets.

Recommendation on how the Tourist Information Centre would work with the Point of Sale

The research on the Llangollen TIC and how it currently works with the outdoor activity sector revealed that there is little contact between them. This means that visitors to the TIC are not exposed to the activity tourism offer and the TIC and the activity businesses' are both missing out on potential commission income from selling activities. Yet there is an example where the TIC is selling a form of outdoor activity: canal boat tours.

In the case of these tours, which are sold in volume from the TIC, the initiative to build the relationship came from the TIC. The mechanism the TIC uses to book canal boat tours and receive commission for selling them is to check availability on the canal boat website and then telephone in a booking. The TIC then sells the tickets to the customer, and pays the canal boat company the net fee, which is the ticket cost minus the TIC commission.

If Option 2 or 3 is adopted by DVA the same arrangement can be set up with the TIC. The inventory can be viewed online and the booking confirmed with the supplier by telephone, thereby incurring no charges through the PoS system. Commission level and the booking fee can be negotiated. If the DVA and the TIC are content, the TIC would also have the ability to make on-line booking on behalf of their clients, with the DVA business benefiting from the additional sale paying the TIC a 10% commission.

Two other activities will need to occur if this is to be successful:

1. DVA businesses will have to work with the TIC staff to ensure they have sufficient knowledge and enthusiasm to sell the products.
2. The activity tourism products will need to be marketing in the TIC through displays and potentially the showing of videos of the activities.

Discussion with TIC staff and management have indicated that there is willingness for this to happen.

Option Analysis

	Option 1	Option 2	Option 3
Capital cost - Low			✓
Capital cost - Medium (to high pending funding raised)		✓	
DVA time invested - Low			✓
DVA time invested - Med (to high, depending on aspirations)		✓	
Ongoing cost - Low			✓
Ongoing cost - Medium (to high, pending on aspiration)		✓	
Control - Low			✓
Control - High		✓	
Develops closer working relationships within DVA		✓	
Start up time - Short			✓
Start up time - Long		✓	
E Commerce Host - Identified			✓
E Commerce Host - Not identified		✓	
Digital security - High risk		✓	
Digital security - Low risk			✓
Access to new clean markets			✓

DVA have now adopted Option 3 as the way forward, have decided to work with Web Ticket Manager, and have set a first year sales target of £10,000. From this figure, it is possible to work out a projected 5 year estimate of income and expenses:

Dee Valley Active - Point of Sale Financial Forecast						
YEAR	2017	2018	2019	2020	2021	5 Year Totals
EXPENSES						
Cost of website build	£1,500.00					£1,500.00
Annual Support (year 1 included in website build cost)		£150.00	£150.00	£150.00	£150.00	£600.00
Financial Fees 3.5% of sales	£350.00	£385.00	£424.00	£466.00	£512.00	£2,137.00
Management Fees 6.5% of sales	£650.00	£715.00	£787.00	£865.00	£952.00	£3,968.00
TOTAL EXPENSES	£2,500.00	£1,250.00	£1,360.00	£1,481.00	£1,614.00	£8,205.00
REVENUE						
Sales	£10,000.00	£11,000.00	£12,100.00	£13,310.00	£14,641.00	£61,051.00
TOTAL REVENUE	£10,000.00	£11,000.00	£12,100.00	£13,310.00	£14,641.00	£61,051.00
Total Revenue + Total Expenses	£7,500.00	£9,750.00	£10,740.00	£11,829.00	£13,027.00	£52,846.00

This shows that for a modest investment of £2,100 upfront, DVA has the opportunity to increase their joint income by over £50,000 over the period. This equates to just over 4% of the projected project revenue.

Additionally DVA, by adopting and embracing the new distribution channel, would increase its profile with visitors planning their Llangollen visit pre-arrival and also increase the opportunity to capture business from those already at the destination.

The third option, with a small amount of start up support from the public sector, is financially sustainable going forward. The ongoing cost for DVA is just £150 per year, or a £10 per member, plus the individual business time commitment of providing good content and maintaining product inventory in a timely way. The modest sales target set by DVA provides a measurable benchmark by which to gauge success or failure. We are confident that this target will be achieved and exceeded. If so the business concept will be proven, the confidence of the DVA in this initiative will assist them in their journey towards functioning as more of a co operative, and the Dee Valley will gain a new distribution channel selling the Valley as a destination.

8. Next Steps

Action Plan

The next steps for this project are:

1. DVA needs to appoint an internal leader to co-ordinate the setting up of the Web Ticket Manager Website and Box Office.
2. This leader needs to work with WTM to ensure that each DVA member provides images, content and inventory to WTM during March 2017 so that the project can be progressed significantly before the season begins at Easter 2017.
3. WTM needs to provide DVA with appropriate manuals about working with WTM; it needs to setup the web page and the box office as soon as possible.
4. WTM needs to work with DVA to get as many of the members to fully participate in the e-commerce element of the website and box office.
5. Denbighshire County Council needs to confirm their contribution to project in terms of investment and in terms of timely marketing of the whole initiative, and needs to progress both of these.
6. DVA and the Llangollen TIC need to progress their improved relationship in March 2017 in terms of increased communication, training by DVA about their products with the TIC staff, and also about use of the website and box office.
7. Llangollen TIC needs to work with DVA to create a promotional presence for outdoor activities in the Dee Valley within the TIC.
8. DVA should set up a regular monthly meeting throughout the season of 2017 to ensure that:
 - a) Monitor and take action where necessary to ensure the website and box office are well populated with content
 - b) That the marketing and promotion of the project is being done – especially with potential agents in the Dee Valley, such as accommodation providers, attractions and catering establishments
 - c) That the relationship with the TIC is flourishing and that any issues/problems are addressed and resolved immediately.
9. A meeting should be held at the end of the season to review what has been achieved, what has been learned, what can be improved, and what does not work, with a view to improving overall performance for 2018. The Consultants have offered to attend this meeting.

Appendix 1

Company Experience

This commission is being undertaken by a consortium of Cartwright Associates, and Black Bear Tourism Services with support from digital media specialists Soup Creative. Two of the consultancies are based in Gwynedd with Soup Creative having offices based in Chester and Cardiff. All are experienced in tourism, adventure activities, online marketing and, crucially, know the study area well. The three principle directors have a wide variety of adventure tourism knowledge and experience. All have worked together previously on digital and ecommerce adventure tourism projects.

We are enthusiastic about this project as we are established members of the North Wales adventure activity and tourism business community. We are also active participants of the existing adventure tourism products. This firsthand experience provides us with knowledge of how tourism businesses are currently operating in North Wales, the keys to success, what works and doesn't work, and how the enthusiast and wider sampler and dabbler markets are evolving in terms of preferences, products and marketing approaches.

Cartwright Associates - Arran Cartwright

Managing Director - 12 years Adventure Tourism Consultancy

- Project and contract management
- Fund sourcing and bid management
- Tourism & outdoor activity feasibility studies, consultancy & strategic planning
- Digital community and business development
- Outdoor activity marketing consultancy
- Community consultations and stakeholder management

Cartwright Associates can evidence the successful delivery of over 80 outdoor recreation commercial commissions in the last 12 years. This contract will be managed by Cartwright Associates UK Ltd in partnership with Jim Embrey of Black Bear Tourism

Black Bear Tourism Services - Jim Embrey

Managing Director - over 25 years in Adventure Tourism

- Activity tourism consultancy
- Tourism and tourist guiding experience
- EU Projects advice and consultancy
- Digital community consultancy
- Outdoor activity feasibility studies, strategies and marketing consultancy

Previous Related Work

Arran was co author of the Visit Wales commissioned 'Bureaux Des Guides Outdoor Activity Providers Feasibility Study' for the establishment of a Bureaux Des Guides booking facility at TIC's across North Wales back in 2007. He partnered with Jim, Wyn and Soup

creative on the Wales Official Tourism Guides Association (WOTGA) and the Mountain Biking (MTB) digital communities projects in 2015. These two projects will provide us with a wealth of experience and lessons learnt from two identical commissions.

Jim Embrey commissioned 2 similar outdoor activity on line bookable projects, called i-Try while he was at Visit Wales (VW). With the Great Excursions North Wales day tour product (2013, 2014 and 2015) he set up a bookable e-commerce website selling day tours, in which he encountered and resolved many of the issues this project is about. He also learned many lessons about what works and does not work, how important it is to match supply to demand, and how back-of-house operations can cause a PoS to succeed or fail.