Marketing Cheshire

Local Visitor Economy Partnership

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Board Papers

Thursday 13th February 2025

Marketing Cheshire | Local Visitor Economy Partnership | Recognised by VisitEngland

Marketing Cheshire Advisory Board

Agenda
Thursday 13th February 2025, 8am – 10am

Join the meeting now Meeting ID: 326 197 754 570 Passcode: qxaDNG
+44 161 250 8784,,964543011# United Kingdom, Manchester

Time		Item	Lead	Reference
08:00am	1	Welcome and Apologies	TB	
08:05am	2	Declarations of Interest	TB	
08:10am	3	Minutes and matters arising from Board Meeting held on 12th December 2024	TB	
08:15am	4	Board Matters - Joint Committee update - Recruitment of new Chair and Board Members	 PC CM	
08:45am	5	MD Report	CM	(Board Paper 282)
09:15am	6	Financial update	CM	(Board Paper 283)
09:45am	7	A.O.B		
10:00am	8	Meeting Close		

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Marketing Cheshire Board Meeting CWTB NO. 5067662

Thursday 12th December 2024 | Park Royal Hotel, Warrington
0800-1000

Present:	**Attendees**
CWTB Directors	Trevor Brocklebank – Chair Philip Cox Sarah Callander-Beckett Colin Potts Eleanor Underhill Mark Goldsmith
In attendance:	Cristian Marcucci Liam Hartzenberg Richard Milkins, Cheshire East Council (observer) Roz Munslow, Cheshire West and Chester Council (observer) Sharon Pond (minute taker)
Apologies:	Jamie Christon Steven Broomhead Gemma Davies Peter Mearns Debbie Simpson Carole Hyde, Cheshire East Council (observer)

Opening by the Chair and Welcome
TB welcomed Board members and thanked them for joining the meeting, advising that this will be TBs last formal meeting as Chair, however, TB confirmed that he will remain on the board to see MC through the transition period.

Declarations of Interest
Board members to advise Sharon of any declarations of interest.

Minutes and Actions from the last Meeting and Matters Arising

LH to ensure CP is added to the website as a Director of MC – **action LH** — Action LH

CM/LH confirmed that discussions around Lady Borwick's visit have taken place with Nicola Said and it is hoped that we will be able to arrange her visit to Cheshire in conjunction with English Tourism Week or a major event such as the opening of Heart of Africa at the Zoo.

It was confirmed that all other actions from the previous meeting have been resolved.

The need to address the funding for Destination Cheshire and whether the two Destination Groups would become standing agenda items going forward was questioned. It was agreed that it would be a good opportunity to look at this when we transition to a business advisory board.

CP highlighted the following points from the previous minutes:

- 3rd para page 2 should be Cheshire becoming a combined authority not ECW
- 2nd Para bottom page 2 – should be tourism delivery arm of organisation.
- 2nd bullet point top of page 4 needs to state 'Housing, Communities and Local Government' department
- Reference to Visitor Economy Roundtable should be 'Chester Visitor Economy Roundtable'

The Board confirmed that with these amendments the minutes from the meeting on the 17th October 2024 were correct.

Board Matters

Joint Committee update

PC advised that the Joint Committee met a couple of weeks ago and agreed that the company director responsibilities would be transferred from the MC Board to a small group of officers. This should not be seen as a closing of the Board but a transition of some of the board's responsibilities giving the board the opportunity to focus on the visitor and place economy issues.

The Joint Committee have made a formal request to amend their Terms of Reference to enable discussions around Devolution and allow for decisions to be made around revenue funding as well as capital funding.

MG advised that this request was approved by Cheshire East Council. The White paper is due to be published this week which is likely to state all authorities will become unitary. It is going to happen, so we need to ensure we get the best possible deal. MG confirmed that the Local Authorities will continue to perform the roles currently undertaken but it will mean that powers to make funding decisions will be passed to the local area instead of being made in Westminster, the mechanics behind this are yet to be resolved.

MG stated that there is an issue around the use of the word 'Mayor' and TB stated that there needs to be more comms to ensure the public understand the concept and benefits of devolution. TB referred to Steve Rotherham and Andy Burnham, advising that they do not have personal power to make decisions, the local authorities still make the decisions, however there is a misconception of what the role is. It was agreed that the Mayoral voice is very important, and Andy Burnham in particular has a very powerful voice as he articulates issues well.

TB referred to the Liverpool to Manchester Rail Board and the lack of representation at the meeting from Cheshire East Council, stating that Cheshire East need to be part of these conversations to ensure we don't miss out on opportunities.

EU suggested that we should move away from discussions around a mayor and instead talk about the strategic opportunities across Cheshire East / Cheshire West boundaries.

MB highlighted the opportunity to unlock the wealth for Cheshire East by increasing the percentage of business rates kept by the Council which will help fund road improvements and town centre regeneration.

SCB questioned whether there would be combined funding from the 3 local authorities to promote the devolution message. PC advised that funding is available from the Enterprise Zone, however comms has been delayed while we wait for the white paper to be published. The white paper will communicate the government reorganisation and will rearticulate the work that will be devolved to local areas.

TB referred to the role of MC going forward and stated that there will be a key role for MC to support the 3 local authorities around comms.

EU questioned whether MC will be responsible for communicating the benefits of the combined authority or the benefits of ECW and quality of place.
CM advised that in the short term the work around devolution is being undertaken by a comms group consisting of CM and the 3 Heads of Comms from the local authorities and a consultant employed by ECW to advise on communications, public affairs and stakeholder management.

CP raised concerns over resources and stated that further consideration needed to be given to the role of MC as to whether its fundamental role should be as the LVEP or whether it should take on a place marketing role.

EU stated that we should embrace the opportunity and not let lack of resource hold us back.

It was felt that in time the role definition will become clearer. MG felt that MC is ideally positioned to take on this role and obtain additional funding as it has a good relationship with all three of the local authorities.

SCB referred to the definition between the promotion of Cheshire as a great place to visit, live and work and that of being the sales office for businesses to relocate to Cheshire and felt the latter is not the role of MC and should be undertaken by the inward investment team.

RMunslow advised that work is continuing on developing the local plan, economic leads and land assessment which will all feed into the overarching strategy that will affect the wider area.

PC advised that as part of the work on devolution a growth plan is being developed. A growth plan is a statutory responsibility for combined authorities and this plan will drive the strategic work of the combined authority once it is set up. The plan is expected to be completed in March and contains a place marketing strand within it.

TB stated that there is a big desire to ensure all the work is undertaken behind the scenes ready for devolution.

Terms of Reference
CM advised that the Joint Committee have approved the Terms of Reference so we can transition the board to an advisory board. This will remove the company director role responsibilities and enable us to focus on the visitor economy role.

CM has sought advice from Debbie Simpson who has recommended that board members agree today to resign their company directorship at the end of January. CM confirmed that relevant paperwork will be issued in January to allow time for the necessary changes to be made at Companies House. TB advised that it will be important for continuity that all board members remain in place if possible.

Recruitment of new Chair and Board Members
In the new year we will be in a position to recruit the new board members and Chair, and we will be working with Sherrington Associates to produce the person specifications for the roles and recruit to the positions.

CM confirmed that board members will have an opportunity to input into the specification for the roles and we will provide a skills matrix. Board members will be asked to use their networks to encourage candidates to apply for the roles.

The process for recruitment was questioned and PC advised that we would work with the MC board and the local authority officers, ultimately the joint committee will approve the recruitment.

CM advised that we would be looking to recruit from the industry and advised of the feedback he has received from JC prior to the meeting – as follows:

- The reputation of MC isn't seen as good in the eyes of the membership with a lack of private sector board members and a dominance of the public sector. This needs to be balanced out.
- JC has said in the past that new board members need to be from the private sector. People who are running visitor attractions/hotels/self-catering/event spaces in the county. Are known and have proven they and their business are successful.
- We need strong representation at BAB so need to recruit a strong chair, who like Trevor, can promote the sector at county level. They need to be well known and respected and have the gravitas to shout about the visitor economy and support Cristian and team.

EU referred to the third sector and asked that we think about the use of the words private sector, and it was suggested that we would use the word operators. EU also asked whether we would focus on representatives with place marketing skills. TB advised that ideally the new Chair will come from within the visitor economy but will also have had a corporate career and have an understanding of place marketing and be able to contribute at joint committee level.

It was confirmed that the local authority representation on the new board will continue but whether it will be an officer or not will depend on each of the local authorities.

TB advised that Louise Gittins has passed on her thanks to the MC board for all the work they have undertaken.

Managing Director Report
CM thanked board members and Liam and the team for their support in his absence, particularly around the Connect event.
CM ran through his presentation MCB2412-Pr01.

Comments from Board
With regard to sponsorship support for the MC awards it was suggested that we should approach the following

- Sarah Dunning, Westmorland (Tebay)
- JWLees,
- Harrods
- The businesses on the business advisory board

TB advised that Manchester City's visitor economy spend is £5 billion, Liverpool £6 billion and Cheshire's is £4 billion, this information is sourced from STEAM data.

EU advised that one of the USPs for Cheshire is that you can travel to most of our market towns via train. CM stated that we can link this into our work with Avanti, Northern and TfW around the Railway 200 celebrations.

SCB referred to the report stating years 22-24 for passengers and LH confirmed it should state to 23-24.

SCB asked how the Christmas Market had performed so far this year. RMunslow advised that the opening weekend had good footfall, but footfall has been impacted by the bad weather. CW&C are undertaking a piece of economic impact assessment work, assisted by the University of Chester, reporting on this will be available in the new year. LH confirmed that we have undertaken branding and foundation work this year that we hope to see a return on next year.

With regard to the film feasibility study MG advised that Media City in Manchester have plans to expand. CM confirmed that we are liaising with the Liverpool and Manchester film offices who are both keen to work with us.

SCB stated that the beneficiaries of an expanded Manchester film office will be within a 50-mile radius so raised concerns that part of Cheshire would not be included within this, however there are a lot of smaller advertising and other production opportunities that we should also look into.

Destination Chester update

CP advised that the last meeting of the group was very positive, partly due to the presentation from Chester Racecourse who updated the group on their revised 5-10 year Masterplan. The Masterplan includes a new hospitality building that will be divisible into different meeting spaces seating a maximum of 1k, which will be available for hire when not being used by the racecourse. Planning permission goes in this week, with a view to undertake the financial feasibility Autumn 2025. All being well it will be constructed by Summer 2027.

CP stated that footfall data in the city centre has been up on the previous year for seven consecutive months, up 1.5% on last year. Accommodation occupancy also continues the positive trend however this appears to be achieved by reducing rate.

It was also advised that Harrods Beauty have applied for planning permission for the ground floor of Debenhams 20k square foot space. The expectation is that will lead to other premium businesses locating to the site. The comms plan at present is not to issue press releases but press releases are drafted ready to be issued at the right time.

SCB asked whether the new market has had an affect on footfall. CP advised that the market has just celebrated receiving 5 million visitors, and there is a positive feeling throughout the city.

Destination Cheshire update

EU advised that the last meeting was very positive with a brilliant presentation from Lion Salt Works. The next steps are to create a plan of action and objectives and obtain funding. EU stated that it would be great if Cheshire East could get involved in supporting the Media Getaway event.

EU /SCB requested that Destination Cheshire is added to the priorities of Q1 and the January meeting added to the diary

Action CM/LH

TB stated that it will be important to look at commercial income streams and sponsorship going forward.

RMilkins referred to Lapland Manchester advising that the estimated visitor spend will be £2.5 million, in year one economic impact due to the build will be approx. £25 million, potential economic spend over 10 years will be £275million. It will create 1200 jobs a year and approximately 1 million people applying for 174k available tickets. A third of visitors to Lapland Ascot stay overnight therefore this could have a real impact to accommodation and attraction visits in Cheshire. Planning application will be considered at the end of January, and the hope is that it will open in 2025, the recruitment will start in March for jobs for the October – January period. CM confirmed that MC have submitted a letter of support.

Financials
TB confirmed that the board from today will no longer have financial responsibility for the business. It was agreed to take the circulated report as read

Comments from Board
CP questioned what the year-end projection is, and CM advised that it is expected to be at a £60k deficit, which will mean we will be £50k -£60k above our minimum reserves level.

EU requested that the new board receive financial headlines going forward. TB advised that the financials going forward will be merged into the ECW financials, so won't be available in the current format.
CP suggested that project by project financials could be produced for the board. EU also highlighted that strategically it would be beneficial to understand resource levels. It was agreed that further discussion would take place on this matter at a future date.

TB felt that going forward it will be more important to look at how we drive our income streams outside local authority funding to increase our activities. CM confirmed that we have started conversations with key partners earlier this year to secure income for next year's activity.

CM advised that with the new website and refreshed approach to PR and social media, travel trade and film office work, our partnership offer is a lot different so we will be increasing our rate card. We will also target new members and will produce additional issues of the visitor guide. The visitor pass will also be a potential income stream.

AOB
The board thanked TB for all is hard work and dedication in chairing the MC board.

TB referred to the Liverpool to Manchester Rail Board and the £17Billion investment, emphasising that we need to be engaged with this project. MG advised that Cheshire East Council haven't been active with the board but will be going forward, stating that there are also other opportunities from a private sector group looking to take on the HS2 route.

TB advised that he is involved in the new town discussions with Ashley and Tatton and referred to the mid Cheshire line from Chester into Manchester. Electrifying this line would be a big win for Cheshire but as the route runs through Cheshire West and Cheshire East there is no voice championing this at the moment. This highlights the need for collaboration between the three local authorities.

Future Board Meetings
0800-1000 Thursday 13th Feb - online
1000 -1200 Thursday 3rd April – in person

0800-1000 Thursday 5th June – online
1000 -1200 Thursday 4th September – in person
0800-1000 Thursday 27th November – online

Signature (Trevor Brocklebank, Chair)

…………………………………

Date

Marketing Cheshire Advisory Board

MD Report

13 February 2025

Period December - February Paper 282

Visitor Economy

Marketing Campaigns and Content

Our Christmas campaign for Chester "Unwrap Chester" primarily sponsored by Transport for Wales (TfW), reached a combined audience of just over 762,000 during its short runtime from 15 November to 20 December.

- 21,062 clicks from paid ads through a Meta campaign focusing on the Chester Christmas Markets and festive events within the city.
- Activity correlates with an increase in demand for markets information on visitcheshire.com with the markets page receiving over 250,000 views in the same period. The campaign click rate of 8% surpassed the 1.6% benchmark.

This was our first campaign commissioning influencers/ content creators. We worked with four micro influencers with between 10-20k audience. In total content accrued 78hrs watch time and 29,940 views, raising awareness of both the Christmas Markets, Transport for Wales and selected partners.

Public Relations

Total of 39 articles in Q3:

- 15 print articles with an audience impact 3.9 million, across 14 titles,
- 24 online articles, with an audience impact of 14.6 million.

Quality coverage in The Times, Sunday Times, The i, Guardian Online, Conde Nast Traveller, Country Living Magazine, Waitrose Food Magazine, and Good Housekeeping, including:

- extensive coverage of Chester's Christmas Market across national, consumer and online press, (14 articles);
- Guardian Online feature following Ben Lerwill's press trip along The Baker Way;
- an extensive feature on Tarporley in The Daily Mail courtesy of a press stay.

We are working closely with JSPR to secure features with national titles around Cheshire Day.

Marketing Cheshire Tourism Awards, Chester Cathedral, Thursday 6th March 2025
Ticket sales now up to 204 from 31 businesses (compared to 221 from 38 businesses last year). While sales are currently down on last year, they are up on 2023 (195 sold). The team is still actively contacting pipeline sponsors for support, we have recently confirmed Hello Starling in addition to the 4 previously secured.

Strategic Projects

Film Office

- Feasibility study ongoing with report and recommendations due in March
- MC attended Focus 2024 film conference in London in December with Chester Zoo, Tatton Estates and Bolesworth
- In person workshop held with around 15 locations at Walton Hall in January, demonstrating considerable appetite for the establishment of a film office
- VisitBritain launched international Starring GB campaign in January, featuring Lyme Park (Pride & Prejudice) in the adverts.
- Ongoing discussions with the Devolution Culture workstream on potential funding routes.

Travel Trade

Consultant's report and recommendations on a new approach to targeting the travel trade received in late January, including a three-year delivery plan. The report will come to the April meeting of the MC Advisory Board for discussion as we are currently working through options for resourcing and prioritisation of activities.

Visitor Pass

The feasibility study has now concluded with the consultant's report attached to the agenda papers. In summary, Cheshire and Chester currently lacks the appropriate volume and quality of attractions to make a stand-alone pass viable. The appetite among attractions isn't sufficiently strong and we have seen recent evidence in Manchester and Oxford (where their pass has been discontinued) of the challenges involved in establishing and monetising such a pass. The study and report have presented several different options, including the option of joining existing schemes in Manchester and Liverpool, or more focused localised activity (eg Big Weekends), and we are currently discussing next steps with LA partners.

Visit Cheshire Website

We are working with Destination Core towards a go-live in Q4. We are holding two webinars with partners to soft launch the new site and provide basic training / familiarisation - 27th February for Signature partners and key stakeholders, and 13th March for all partners. A recent discussion around keyword research highlighted our current impressive performance and discussed steps needed to retain and grow our rankings/ authority alongside an improved content strategy.

The current website, continues to perform well with an average page view count of 4, a 1:07s dwell time and 91% engagement rate;

- November, 778,305 views, 193,570 users
- December, 538,838 views, 134,643 users

Outreach and Events

Media Gateway 2025

Following recent discussions with conference organisers and difficulties they are having with their 2025 host city of Bradford, we have agreed to bring the event to Chester for 2025. Media Getaway brings around 100 travel journalists and destinations from across the world together for a 3-day event from 7-9 July. We are now confirming venues for the three days (a site visit is taking place on Tuesday 11th). The £15k hosting fee for the event is being split between MC, Cheshire West and Chester Council, the CHA and the Chester Attractions Partnership.

Booking.com

As part of the thirteenth edition of the Traveller Review Awards, Booking.com named Chester one of the 10 Most Welcoming Cities on Earth for 2025, along with tips and recommendations to help travellers fully embrace the charm of these unique destinations. Backed by over 360 million verified customer reviews on Booking.com, the featured accommodations are celebrated for consistently delivering outstanding hospitality. We are now working with Booking.com to host a celebration event and prize giving in the city this summer.

UKREiiF

Monthly meetings are ongoing with local authority business support teams. Warrington Borough Council, along with private sector partners, has agreed to fund a drinks reception on Tuesday 20 May at the Tetley in Leeds, close to the Royal Armouries site where UKREiiF is hosted. This will be a product launch for the Town Centre Investment Prospectus. ECW are in ongoing correspondence with the UKREiiF team to secure as many speaker slots as possible to profile Cheshire and Warrington public and private sector leaders on the main stages at the event.

Data and Insight

We continue to see a growth in traffic/ passenger numbers at Chester station. Over the last quarter an increase of 26% on the previous year, and 5.8% YoY between period 9 (10 Nov-06 Dec)and period 10 (08 Dec-03 Jan) period 8 (13 Oct-09 Nov) saw the biggest growth of 34% YoY

Commercial Approach

For the new financial year, we have been exploring ways to increase commercial income, in particular the opportunities available with a new website and how we can work more with BIDs and Town Councils. The new website will allow for greater partner visibility, in addition to new tools and features, we have therefore reflected an increase in partnership prices by 10%, basing on current renewals this will create an additional £10k of revenue.

Partnership levels are renamed to Inclusive (silver) Enhanced (gold) and Signature (Platinum), while a new Artisans package, for F&B operators will allow independents to access spotlights and social media inclusion for £450. An additional package for key events will pull together local accommodation listings and associated businesses into a single event page.

We have redesigned our rate card outlining our new offer which accompanies a rebranded pitch deck highlighting our reach, remit and value. We will also increase our What's On pricing by 10% to coincide with print price increases.

"Destination" partnerships will be offered to Town Councils and BIDs, allowing to feature multiple businesses within their individual areas with a sub-section feature on the website and will include digital advertising, PR roundtables to explore media opportunities, social media take overs and dedicated account management and reporting. Two levels will be offered at £5k and £10k.

We have been working closely with the Visitor information Centre on several projects, the first is partner takeovers. We are hoping the first event will take place with BusyBus during the Easter holidays, price is tbc.

The Chester Visitor Map is a high seller within the VIC, with over 10k copies sold annually. Currently they are purchased from an external supplier and outdated. We are looking to bring the design and print in house. Based on current costs it is expected to generate an additional £3,700 pa.

Revenue

To date we have a total of 105 partners bringing a revenue of £63,350. The focus for the quarter is on the remaining sales for the April – June edition of the What's On with 50% of ad sales (£4,100) confirmed and remaining digital activity for events being held for February half term and Easter holidays. The overall revenue to date is £171,850 against a target of £170,280.

We now focus on the new financial year, with Chester Zoo confirming a package to include Christmas, larger marketing campaign and travel trade. Bewilderwood have confirmed a package to include seasonal campaign advertising, partnership and the What's On. Further meetings with larger partners are taking place over the next month in advance of the new financial year.

Enterprise Cheshire and Warrington

Devolution Communications & Engagement
I am a member of the Devolution Comms and Engagement Group and working with LA partners on behalf of ECW, on the developing devolution proposition. We have brought in a comms consultant to advise and influence on delivery, have built and launched a new devolution website and commissioned Social to support on the engagement programme. Following the announcement that Cheshire & Warrington is on the priority programme for devolution, and therefore on track to create a Combined Authority and hold mayoral elections in May 2026, the call on my team is increasing and we are looking to partly backfill my role to ensure ongoing capacity within MC

Partner Meetings

Destination Chester, Chester Zoo, 23rd January
Included a MC LVEP update, Chester Zoo update on The Reserve and Heart of Africa, and a presentation on the Gladiator exhibition coming to the Grosvenor Museum in late 2025.

Destination Cheshire, 9th January
Jane Hough, Groundwork provided the group with an update on work in Northwich, Warrington and surrounding areas. New Terms of Reference for the group were approved and the members of the newly formed steering group were confirmed. Aligned with the ToR, the new priorities for the group were shared. They are:

- **Development and promotion of Cheshire Day** - to be measured in 2025 by social media activity and engagement, web visits, PR coverage; 3-5 year plan to be developed to include options for securing UKSPF or other funding
- **Championing the Cheshire and Warrington visitor economy** - with a focus on key towns and the rural VE, to raise the importance of the visitor economy with political stakeholders. To ensure visitor economy opportunities and challenges feature in C&W's Sustainable and Inclusive Economic Strategy and Growth Plan
- **Christmas in Cheshire and Warrington -** collaboration with Town Councils, BIDs and attractions/partners to promote Christmas activity across the region

Look ahead – Feb-April 2025 priorities

- **LVEP Parliamentary Showcase, 25th February, Portcullis House**
- **Marketing Cheshire Awards, 6th March**
- **Destination Chester Showcase, 10th March**
- **English Tourism Week, 14-23 March**

- **Cheshire Day, 30th March:** our focus for the week of 24th -30th is Cheshire food and drink with the opportunity for hotels/ restaurants and independents to get involved with a Cheshire Menu of locally sourced ingredients plus a focus on local suppliers. We are also looking to build in our Cheshire menus and products as part of a press / influencer trip with a possible two-day itinerary during English Tourism Week 17th-24th (in advance of the day).

MARKETING CHESHIRE VISITOR PASS FEASIBILITY STUDY

This report outlines the findings of QLINE Consulting during the research period for the Marketing Cheshire Visitor Pass Project.

Funded by UK Government

QLINE

ABOUT THIS REPORT

This report aims to assess the feasibility of creating a visitor pass to encourage increased tourism and spending in Cheshire. If it is feasible, the pass will be launched in the current financial year 2024/5.

We intend to provide the reports to support the decision to proceed (or not) with this project by researching similar existing schemes, understanding the overall landscape of attractions in Cheshire and their perception of and interest in such a scheme, and working with attractions to understand their needs in order to participate in the scheme.

How this report was compiled

This report is the output from a research project which took place from October 2024 through to January 2025.

Key Deliverables

- Economic Analysis - We evaluated the costs and potential revenue of a visitor pass, and whether it is a viable option to progress with.
- Benchmarking – We researched and reviewed successful visitor pass models in the UK and Europe.
- Stakeholder Engagement - We conducted interviews to gather feedback on a potential visitor pass with key stakeholders within the local and wider tourism industry and local economy.
- Platform Selection and Implementation Plan – We researched and identified the most suitable visitor pass platform and model. This includes an outline of timeline, staffing, and technology requirements should you wish to go ahead with creating a pass.
- Market Research - We also undertook research to help determine pricing, point of sale, and distribution channels for a pass.

This report comprises headlines from general industry research, key talking points from one-to-one interviews with key stakeholders in the Cheshire tourism industry and other Destination Marketing/Management Organisations, and information from other visitor pass schemes which will assist in deciding on the next steps for Marketing Cheshire.

DESK RESEARCH

DESK RESEARCH

UK TOURISM INDUSTRY OUTLOOK: POSITIVE RECOVERY WITH A FOCUS ON QUALITY AND SUSTAINABILITY

The UK tourism industry was on a positive trajectory in 2024, building on its recovery from the pandemic. VisitBritain forecasted a strong year with 38.7 million inbound visits, nearing pre-pandemic levels, and visitor spending reaching £32.5 billion, surpassing 2019 figures. This growth was driven by factors like increasing numbers from long-haul markets (North America and East Asia) and a focus on the luxury sector catering to high-spending travellers.

38.7m

Number inbound visits were forecast to increase to in 2024

However, the industry also faced challenges in 2024, including rising costs of living and economic uncertainty impacting travel decisions, staffing shortages, and increased competition from other destinations as international travel rebounded.

https://www.visitbritain.org/research-insights/inbound-tourism-forecast

DESK RESEARCH

Looking ahead to 2025, the outlook remains positive with continued growth expected. The industry is poised to capitalise on the momentum of 2024, with a focus on providing high-quality, authentic experiences that resonate with travellers.

Sustainability will be a key priority, with a growing demand for eco-friendly accommodations and responsible travel options. Technology is also expected to play a bigger role, with advancements in AI-powered travel planning and personalised experiences.

Challenges still persist, including global economic uncertainty that could dampen travel demand, and ongoing competition from other destinations.

"AI is transforming the travel and tourism industry, from personalised recommendations and itinerary planning to chatbots and virtual assistants that provide 24/7 customer support. This technology is enhancing the traveller experience while also streamlining operations for businesses."

pwc

https://www.visitbritain.org/research-insights/inbound-tourism-forecast
Ciklum: https://www.ciklum.com/resources/blog/travel-predictions-2025
https://www.weforum.org/stories/2023/12/how-is-ai-reshaping-the-travel-tourism/

DESK RESEARCH

THE ENGLISH TOURISM INDUSTRY: RECOVERY, RESILIENCE, AND THE ROAD AHEAD

The English tourism industry in 2024 continued its recovery from the pandemic, building on the positive trends observed across the rest of the UK. While specific figures for England are difficult to isolate, the overall increase in inbound tourism likely benefited the country.

The luxury travel segment within England continued to thrive, driven by high-spending international travellers. Efforts to promote tourism beyond major cities also saw continued development, attracting visitors to various regions of England.

However, challenges remained. Rising costs of living and economic uncertainty impacted travel decisions, potentially affecting visitor numbers and spending. Staffing shortages also persisted, impacting the industry's ability to meet demand. Additionally, England faced competition from other attractive destinations within the UK and internationally.

https://www.visitbritain.org/

DESK RESEARCH

Looking ahead to 2025, the English tourism industry is projected to continue its recovery. There will likely be an increased emphasis on providing high-quality, authentic experiences that resonate with travellers.

As with the rest of the UK, sustainability will be a key priority, with a growing demand for eco-friendly accommodations and responsible travel options. And technology is also expected to play a bigger role, with advancements in AI-powered travel planning and the creation of personalised experiences at the forefront of tourism agendas.

However, challenges still persist. Global economic conditions could dampen travel demand, and competition from other destinations within the UK and internationally will remain.

GREAT BRITAIN

"There's a clear shift in consumer behaviour towards sustainable travel. More and more travellers are actively seeking out eco-friendly accommodations and responsible travel options, prioritising experiences that minimize their environmental impact and support local communities. This presents a significant opportunity for the tourism industry to adapt and offer more sustainable choices."

https://www.visitbritain.org/

DESK RESEARCH

INBOUND TOURISM

Inbound tourism to England is experiencing strong growth in 2024, surpassing pre-pandemic levels in many regions.

Visits

Year-to-date, both London and the Rest of England saw a significant increase in international visitors compared to 2019 and 2023. The Rest of England even achieved record visitor numbers. Most English regions experienced a rise in visitor numbers in the first half of 2024 compared to 2019, with exceptions in the West Midlands and South East. Compared to 2023, only the East of England saw a decline. The second quarter of 2024 showed a slight slowdown in recovery compared to the first quarter, indicating that the pace of growth may be moderating.

Visits (000)	Q1 2024	Record?	% change vs. Q1 2019	% change vs. Q1 2023	Q2 2024	Record?	% change vs. Q2 2019	% change vs. Q2 2023	YTD 2024	Record?	% change vs. YTD 2019	% change vs. YTD 2023
London	4,836		6%	15%	5,591		4%	5%	10,427		5%	10%
Rest Of England	3,498	Yes	6%	13%	4,357		0%	12%	7,855	Yes	3%	13%
North East	107*		11%	78%	141*		-3%	21%	248		3%	40%
North West	823	Yes	19%	11%	1,007	Yes	10%	19%	1,831	Yes	14%	15%
Yorkshire	259		2%	6%	302		-1%	-1%	560		0%	2%
West Midlands	575	Yes	6%	38%	553		-10%	13%	1,128		-3%	25%
East Midlands	237		-7%	4%	334	Yes	20%	22%	572		7%	14%
East Of England	498		17%	4%	519		-5%	-11%	1,017		5%	-4%
South West	452	Yes	11%	28%	724		4%	18%	1,175	Yes	7%	22%
South East	879		-4%	13%	1,292		-10%	18%	2,171		-8%	16%
Scotland	617		39%	8%	1,358	Yes	49%	17%	1,975	Yes	46%	14%
Wales	153		-2%	2%	292		-5%	15%	445		-4%	10%
Total GB	8,731		5%	14%	10,778		4%	9%	19,509		4%	11%

2023 IPS Nations and Regions Annual Inbound Update (Published 17th May 2024)

DESK RESEARCH

Spending

Visitor spending in England is also showing strong growth. Spending in the Rest of England surpassed both 2019 and 2023 levels, reaching a new record high. In London, spending increased compared to 2019 but slightly declined compared to 2023 due to a weaker second quarter. All English regions experienced growth in visitor spending during the first half of 2024 compared to 2019.

Spend (£m)	Q1 2024	Record?	% change vs. Q1 2019	% change vs. Q1 2023	Q2 2024	Record?	% change vs. Q2 2019	% change vs. Q2 2023	YTD 2024	Record?	% change vs. YTD 2019	% change vs. YTD 2023
London	£ 3,352		8%	0%	£ 4,078		10%	-4%	£ 7,430		9%	-2%
Rest Of England	£ 1,734		29%	-2%	£ 2,445	Yes	12%	5%	£ 4,179	Yes	18%	2%
North East	£ 41*		5%	-37%	£82*	Yes	2%	12%	£ 123		3%	-11%
North West	£ 393	Yes	41%	5%	£ 538	Yes	19%	1%	£ 931	Yes	28%	3%
Yorkshire	£ 107		34%	-19%	£ 110		6%	-30%	£ 217		18%	-25%
West Midlands	£ 239		40%	25%	£ 243		30%	-10%	£ 482	Yes	35%	5%
East Midlands	£ 88		17%	-34%	£ 140	Yes	19%	12%	£ 228		19%	-12%
East Of England	£ 177		23%	-29%	£ 236		-12%	-4%	£ 413		0%	-17%
South West	£ 257		47%	26%	£ 422	Yes	20%	11%	£ 679	Yes	29%	16%
South East	£ 432	Yes	13%	5%	£ 674	Yes	7%	23%	£ 1,106	Yes	9%	15%
Scotland	£ 321		52%	-9%	£ 1,170	Yes	65%	7%	£ 1,491	Yes	62%	3%
Wales	£ 68		24%	2%	£ 134		1%	10%	£ 203		8%	7%
Total GB	£ 5,530		15%	-1%	£ 7,902		15%	0%	£ 13,433		15%	0%

***NB** – While we have included a short summary on inbound data we have not gone into significant detail. This is based on feedback from Cheshire's key stakeholders whose core audiences are primarily domestic and local rather than international.

2023 IPS Nations and Regions Annual Inbound Update (Published 17th May 2024)

DESK RESEARCH

DOMESTIC TOURISM - EXPLORING ENGLAND: DAY TRIP TRENDS

Domestic day visits in England saw a significant increase in 2023 compared to the previous year, with the first half of the year experiencing stronger growth, likely attributed to the lingering effects of COVID-19 restrictions in early 2022.

This surge in visits translated to a substantial increase in spending, both in nominal and real terms. While the average spend per visit rose nominally, it declined slightly when adjusted for inflation.

London emerged as the leading region, boasting the highest volume and value of visits and experiencing the strongest year-on-year growth. This trend mirrored the overall increase in visits to large cities and towns across England.

While visiting friends and relatives remained the most common reason for day trips, growth in this category was relatively flat. Conversely, visits to attractions experienced a notable uptick. Notably, trips to visit friends and relatives, along with those undertaken for food and drink, nightlife, and specialty shopping, contributed the most to overall spending in 2023.

VisitBritain Domestic day visits: Q4 2023 and 2023 overall (March 2024)

DESK RESEARCH

Domestic day visits in England headlines

- 1 billion day visits in 2023, up 8% v 2022
- £44.4bn spend, up 15% v 2022 (up 7% in real terms)
- £44 average spend per visit, up 6% v 2022 (down 1% in real terms)

Domestic day visits in Great Britain headlines

- 1.2 billion day visits in 2023, up 7% v 2022
- £50.8bn spend, up 13% v 2022 (up 5% in real terms)
- £44 average spend per visit, up 6% v 2022 (up 2% in real terms)

VisitBritain Domestic day visits: Q4 2023 and 2023 overall (March 2024)

DESK RESEARCH

THE REGIONAL STORY

Visits (million)	Q4 2023 (Oct-Dec)	Q4 2023 % share	2023	2023 % share	% change vs 2022
London	68	24%	210	21%	24%
Rest of England**	213	76%	806	79%	5%
North East	7	3%	34	3%	20%
North West	31	11%	119	12%	-6%
Yorkshire	23	8%	87	9%	12%
West Midlands	28	10%	98	10%	11%
East Midlands	23	8%	88	8%	16%
East of England	27	10%	98	10%	-11%
South West	28	10%	101	10%	3%
South East	45	16%	177	17%	9%
*Other/unspecified***	1	1%	10	1%	1%
ENGLAND TOTAL	282		1,021		8%

In 2023, London emerged as the top destination for Tourism Day Visits, followed by the South East and North West.

- Beyond London, the South East, North West, West Midlands, South West, and East of England received the highest number of visits throughout the year.
- While London, South East, and North West consistently attracted the largest share of visits, the regions with the most significant year-on-year growth were London (+24%), North East (+20%), and East Midlands (+16%).
- Conversely, the North West and East of England experienced a decline in visits compared to 2022.

VisitBritain Domestic day visits: Q4 2023 and 2023 overall (March 2024)

DESK RESEARCH

WHAT ACTIVITY?

England Tourism Day Visits (million)	Q4 2023 (Oct-Dec)	Q4 2023 % share of ENG	2023	2023 % share of ENG	% change vs 2022
Visited friends or relatives	70	25%	273	27%	-1%
Went to a visitor attraction	51	18%	181	18%	20%
Took part in outdoor leisure activities and sports	11*	4%*	57	6%	-9%
Went sightseeing and exploring areas	21	7%	76	7%	2%
Took part in hobbies and interests	15	5%	57	6%	16%
Took part in a health or wellbeing experience	2*	1%*	9*	1%*	-14%
Attended a special event or celebration of personal nature	25	9%	86	8%	21%
Attended an organised public event	26	9%	90	9%	19%
Went to an arts, cultural or entertainment experience	11*	4%*	35	3%	40%
Food and drink, a night out or speciality shopping	44	15%	131	13%	0%
Took part in other leisure activities	7*	2%*	25	2%	31%
ENGLAND TOTAL	282		1,021		8%

Tourism Day Visits to friends/relatives was the most frequent activity in 2023 in England.

Mirroring the national trend in Great Britain, visiting friends and relatives, exploring visitor attractions, and engaging in food, drink, nightlife, and specialty shopping were the most common activities for tourism day visits within England during both Q4 2023 and the full year.

- Spending Growth: Most activities experienced increased spending between 2022 and 2023, with notable growth observed in arts/cultural/entertainment experiences (+40%), special events/celebrations (+21%), visitor attractions (+20%), and organised public events (+19%).
- Spending Decline: Conversely, spending declined for visits to friends and relatives (VFR), outdoor leisure activities, and health/wellbeing experiences.

VisitBritain Domestic day visits: Q4 2023 and 2023 overall (March 2024)

DESK RESEARCH

DOMESTIC OVERNIGHT STAYS

80% proportion intending a UK overnight trip at any point in the next 12 months (at Dec 2024)

22% of UK intenders had already booked their domestic trips for April 2025 (at Dec 2024)

1 - 3 the number of nights a short break taken in the next four months is most likely to be

45% of people are planning to stay at a ‘Hotel / motel / inn’ followed by ‘Friends or relatives’ home’ at 20%, and ‘Guest House / Bed and Breakfast’ at 11%

VisitBritain Domestic Sentiment Tracker (Dec 2024)

DESK RESEARCH

London is the most preferred UK overnight destination for trips in January to March 2025 while the South West is preferred in April to June 2025. The North West sits top-middle of the tables for both January to March and April to June 2025 trips.

VisitBritain Domestic Sentiment Tracker (Dec 2024)

DESK RESEARCH

BARRIERS

Top 3 barriers to taking a UK overnight trip in the next 6 months

- UK weather
- Rising cost of living
- Personal finances

VisitBritain Domestic Sentiment Tracker (Dec 2024)

DESK RESEARCH

51%

of UK adults stating ‘WORST IS STILL TO COME’ regarding the cost of living crisis

19%

of UK adults intend to ‘spend less on eating out’ and ‘look for more ‘free things’ to do’ when planning their day trips

VisitBritain Domestic Sentiment Tracker (Dec 2024)

DESK RESEARCH

CHESHIRE TOURISM IN NUMBERS

£3.9 billion value of Cheshire's visitor economy

56 million recorded visits

3.75 million people made an overnight stay (+4.1% on 2022, and +1.62% on pre-pandemic levels

8,543 number of beds

920k Cheshire residents (1.5% of UK population)

55+ couples primary demographic of visitors, followed by couples aged 24 to 44, families and business visitors

Visitors to Cheshire mainly come from within Cheshire and the North West

See Resources appendix for list of sources for these statistics

STAKEHOLDER INTERVIEWS

STAKEHOLDER INTERVIEWS

The one-to-one interviews with the attractions gave key stakeholders a chance to express their views on what a visitor pass might deliver for Cheshire and their organisations. Overall **12 visitor attractions and tour operators, plus two accommodation providers gave their views** in one-to-one interviews. We also spoke with **four Destination Marketing Organisations** from other regions, and **Chester BID**. **One transport provider** also spoke with us.

As well as speaking about their attractions and audiences in detail, we discussed their experiences of cross attraction tickets they are already part of. We also asked what they would feel the opportunities and barriers would be to being part of a visitor pass scheme, and took a score on their interest of being part of a scheme, out of 10.

***NB - It’s worth noting that throughout the consultation period, most accommodation and transport providers, a key part of the tourism industry structure and offer, would not engage in the process.**

ATTRACTION/TOUR STAKEHOLDERS

GENERAL VIEWS ON VISITOR PASSES

There is a range of enthusiasm for a Cheshire visitor pass scheme, from very enthusiastic to more cautious and ambivalent.

Most attractions recognise the **potential for increased promotion and attracting new audiences**, particularly from outside the local area. However, there is a strong emphasis on the **need for the scheme to be well-designed, fair, and financially viable** for all participants, regardless of size.

"I think from the organisation's point of view and from the visitor's point of view, to have everything in one place... I think that just helps with your planning"

"For me, whenever I've done it before, it's been the sale of the benefit of the bigger, wider marketing package really, and being part of that."

ATTRACTION/TOUR STAKEHOLDERS

Opportunities presented by a pass scheme

- **Increased promotion and brand awareness -** Most attractions see the pass as a valuable marketing tool for promoting themselves and Cheshire as a destination, potentially reaching new audiences and encouraging multi-day stays.
- **Attracting new audiences -** Several attractions see the pass as an opportunity to attract visitors from outside their typical catchment area.
- **Encouraging multi-day stays -** The pass could encourage visitors to stay longer in Cheshire and explore multiple attractions, benefiting the local economy.
- **Themed itineraries and accessibility -** There is potential for themed passes focusing on specific interests (e.g. science, heritage, accessible tourism), which could enhance the visitor experience.
- **Supporting smaller attractions -** A well-designed scheme could provide valuable support to smaller attractions and promote a more diverse tourism offering.

"I think it's a brilliant idea theming the different opportunities to try and make it work for everyone. Thinking like 'Icons of Cheshire' or 'Accessible Adventures'"

JODRELL BANK

ATTRACTION/TOUR STAKEHOLDERS

Key barriers to participation

- **Financial concerns** - A major concern across several attractions is the potential financial impact, including the risk of reduced visitor income, commission rates charged by pass providers, and the need for sufficient revenue per head to justify participation.

- **Integration with existing systems** - Integrating with existing ticketing and booking systems is a significant technical challenge, especially for those using bespoke systems or council-managed systems.

"Because it feels like almost, we're giving away stuff. But we don't know what the return is going to be, and that's sort of the risk."

"It's really important to us that we have some control over our wider marketing and discounting... How might that cannibalise our membership offer?"

CHESTER ZOO

"Because we don't have a central company running things, basically everyone is freelance... so it could be quite an onerous kind of thing, but that would depend how it was structured really."

The Cheste Tou

ATTRACTION/TOUR STAKEHOLDERS

- **Administrative burden** - The potential for increased administrative workload, particularly for smaller teams and those reliant on volunteers, is a concern.

- **Cannibalisation of existing programmes** - Concern was also raised about the pass potentially cannibalising attractions existing and successful membership programmes.

- **Location and visit duration** - Attractions that are in more rural locations with typically longer visit duration of 3-4 hours raised concerns that they might be a less attractive option for pass holders seeking to visit multiple attractions in a single day.

"When people turn up on the site, whether it's something done online beforehand or redeemed there and then on the gate, it needs to be as simple as possible and work with our systems."

"I think that's the side of it I'll be very conscious of is, you know... The business services team, it needs to be kind of really, easy for them. As easy as possible."

“Potentially could be a larger uptake, we might have to consider how, if you have got a lot of locals using it, how might that cannibalise our membership offer.”

ATTRACTION/TOUR STAKEHOLDERS

- **Competition and fairness** - There is a concern that the scheme could be dominated by larger attractions, particularly Chester Zoo, potentially overshadowing smaller participants. Ensuring fairness and equal representation is crucial.

- **Lack of clarity and data** - Several attractions expressed a need for more clarity on the specifics of the pass, its structure, and potential benefits, as well as data demonstrating its effectiveness in attracting wider audiences.

"It needs to be fair for more people to jump on board with it, otherwise it will just be the big players."

The Ice Cream Farm

CHESTER CATHEDRAL

"Is it Chester, or is it Cheshire?... you kind of talk about the county as a whole, but actually I would pretty much guarantee we don't get anyone from East Cheshire at Chester Cathedral."

"Its whether [visitors] see that as value for money when they get here, when the ticket price isn't that high anyway."

JODRELL BANK

ATTRACTION/TOUR STAKEHOLDERS

Other thoughts on visitor passes

- **Importance of staff involvement** - The Canal & River Trust highlighted the potential benefits of a staff pass scheme, allowing employees of participating attractions to visit each other for free, which could improve staff morale and knowledge.

- **Need for collaboration and coordination** - Several attractions emphasised the importance of strong collaboration and coordination among local attractions and destination marketing organisations to ensure the success of a visitor pass scheme.

- **Focus on volume vs. revenue** - Potent Potion Group indicated that in Chester, their focus would be on driving volume and awareness rather than maximising revenue through the pass, given their current market position.

CHESTER
CATHEDRAL

"I suppose to some degree it's whether it delivers a volume. I would imagine that's something our commercial director would say. Actually, is it worth engaging with if it's going to deliver 2 or 3 interactions a year...Really it's just whether it is a saleable product. I'm a little hesitant... we are under resourced here, is it worthy of our attention?""

ACCOMMODATION STAKEHOLDERS

Due to lack of engagement with the project, we were only able to interview **two accommodation providers**, a small family-run guesthouse based in Chester and the Chair of Chester Hospitality Association. Here is the snapshot of insights from those interviews.

GENERAL VIEWS ON VISITOR PASSES

Generally feedback was fairly sceptical about a visitor pass's effectiveness, with the feeling that there are more pressing issues for Cheshire's tourism industry that should be addressed first in order for something like a visitor pass to succeed. This stemmed primarily from a feeling that there is a lack of collaboration and a lack of priority given to tourism within the region, with current leadership and structures within organisations like Marketing Cheshire and the local authorities hindering progress.

For right now, where Cheshire and Chester is... it's the wrong priority... is it something that is in the scheme of things nice to do? Will it have some impact. It'll have some impact, some will do better out of it... it would arguably be very much a local card.

"If the scheme benefits larger hotels like the Grosvenor, it wouldn't help smaller guesthouses like mine."

ACCOMMODATION STAKEHOLDERS

Areas to look at

- **Increased collaboration** - Fostering a more collaborative environment among businesses within the hospitality sector, similar to the model in Liverpool.
- **Improved leadership** - A more representative board for Marketing Cheshire with stronger hospitality representation.
- **Addressing fundamental issues** - Focusing on addressing core challenges like insufficient funding and lack of marketing efforts in key tourism markets.

Challenges for a pass scheme in hospitality/accommodation

- **Challenges for small providers** - Competition from online booking platforms, competing with established loyalty programs like Booking.com, and seasonal fluctuations.
- **Importance of direct bookings -** Increased revenue and control over customer relationships.
- **Shifting travel habits -** Guests are exploring cost-effective travel options like car rentals.

ACCOMMODATION STAKEHOLDERS

- **Administrative burden -** The difficulty of implementing and maintaining a pass system for numerous independent businesses.

- **Limited effectiveness -** Doubts about the long-term effectiveness of such a system, given the potential for low usage and difficulties in maintaining customer engagement.

CHESTER CH HOSPITALITY

"I think, in terms of visibility, if that's being sold as a benefit for people coming to the town, then I think having the Blue and Green Badge Guides associated with that would give us more visibility... If [visitors] see the what the possibilities are and what's available, and the more ways that you can show that the better."

"It needs to be cost-effective, with clear promotional benefits... I'd sign up tomorrow if it didn't cost me and brought free publicity."

In summary, it was felt there is a need for strategies to encourage direct bookings and navigate the changing landscape of travel habits and booking platforms, especially for smaller providers. Both interviewees thought a visitor pass, while potentially beneficial, is not the highest priority, with concerns about its feasibility and potential for success

TRANSPORT

Due to lack of engagement with the project from transport providers, we were only able to interview **Kristy Littler from Chester Park & Ride**.

The interview revealed both significant opportunities and challenges for integrating the park and ride into a visitor pass scheme.

Opportunities

- **Increased Visibility & Usage** - A well-designed visitor pass could significantly increase the visibility and usage of the park and ride service among tourists, potentially leading to increased revenue and reduced reliance on council subsidies.
- **Enhanced Tourism Experience** - By offering convenient and affordable transport options, the park and ride can enhance the overall visitor experience in Cheshire, encouraging longer stays and more exploration of the region.

"We found that the tourism market is one that is really underutilised... We haven't had the resources or the sort of expertise to try and do that." [marketing and promoting the park and ride service to tourists]

TRANSPORT

- **Reduced Congestion & Improved Air Quality** - Increased park and ride usage would contribute to reduced traffic congestion in the city centre, leading to improved air quality and a more pleasant visitor experience.

- **Synergies with Other Attractions** - Integrating park and ride into a wider visitor pass scheme could create attractive packages for tourists, bundling transport with entry to attractions and other experiences.

Challenges

- **Financial Sustainability -** Ensuring the financial viability of the park and ride service within a visitor pass scheme is a major concern.

- **Limited Resources -** The park and ride team faces resource constraints, including limited budget and staff, which can hinder their ability to effectively market the service and engage with potential partners.

TRANSPORT

"I think we've made links [to] Marketing Cheshire in the past, but I think there's been a number of changes [to] staff. So we kind of got somewhere and then didn't get anywhere... we've had resources pulled elsewhere so we haven't focused on that unfortunately."

- Internal Collaboration - Limited collaboration with other departments within the council and with other stakeholders, such as tourism operators and marketing organisations, presents a significant challenge to the effective integration of park and ride into tourism initiatives.

- Data Limitations - Limited data on tourist travel patterns and usage of the park and ride service hinders the development of targeted marketing campaigns and the effective integration of park and ride into tourism initiatives

*NB - We were asked not to share any of the sensitive market data that was mentioned in the interview.

DMO FEEDBACK

During the consultation period we spoke with representatives from **Destination Marketing Organisations** (Visit Essex, Visit Kent/Hertfordshire, Experience Oxfordshire, Visit Manchester) all tourism organisations responsible for promoting their respective regions. We also spoke with **Chester BID**. These interviews explored their experiences of implementing visitor pass schemes within their areas, and for the BID, what their involvement could realistically look like and if they were supportive of a scheme.

Success factors for visitor pass schemes

- **Clear value proposition** - The pass must offer genuine value to both visitors and participating businesses.

- **Target audience definition** - Clearly defining the target audience (locals, domestic/international tourists) is crucial for tailoring the pass effectively.

- **Financial viability**
    - Determining appropriate discount levels for businesses while maintaining profitability for both visitors and attractions is essential.
    - Ensuring the pass generates sufficient revenue to cover operational costs and marketing efforts is critical.

DMO FEEDBACK

- **Operational efficiency -** Seamless integration with existing ticketing and operational systems is crucial for smooth implementation.

- **Effective marketing -** Strong marketing campaigns are needed to raise awareness, drive sales, and communicate the value of the pass to the target audience.

- **Addressing logistical challenges**
  - In rural areas, transportation solutions to connect attractions are vital to enhance visitor accessibility.
  - Addressing "last-mile" transportation challenges is crucial for visitor convenience.

"It would likely be more beneficial for locals due to Essex's vast size. For tourists who typically stay 1-2 nights, the value might not be as apparent since they wouldn't have time to visit many attractions. Localised passes for specific areas like Southend or Colchester might work better."

visit essex

VISIT KENT
GARDEN of ENGLAND

"The challenges [attractions] were having were around the level of discounts that businesses would need to offer and how many would be sold. Just the finances of that were difficult."

DMO FEEDBACK

In summary, while visitor pass schemes hold the potential to enhance visitor experiences and boost local economies, they require careful planning, strong operational execution, and a deep understanding of the target audience and the local context to be successful.

Addressing the financial, operational, and logistical challenges is crucial for ensuring the long-term viability of any visitor pass scheme.

"I think having a pass is a good thing... It shows great value, and that is such a strong message... Makes us, as a destination, globally an attractive place to visit."

"Regarding The Oxford Pass... Essentially a great concept, but getting wider Oxfordshire product (beyond the obvious) to understand trade rates was a challenge ,as was making it commercially viable. Ultimately it needs good technology and solid dedicated resource to manage it – it was much more of a good will pilot this side"

"If I was gonna go back, I would just have everyone in the same room... and say, if you want this to happen for Manchester... This is what we need. This is the price. This is the return you should expect. If we don't get the buy in from all of you, it's just not feasible."

BID FEEDBACK

The **Chester BID** interview revealed a cautious but open-minded perspective on visitor passes.

Experiences with similar schemes - The BID runs a Chester gift card program, which requires "substantial" effort to promote and maintain. They have also personally used visitor passes in other cities as a visitor, noting the importance of a clear and compelling offer.

Negative issues/barriers faced - The main concerns are the geographical spread of Cheshire, limited public transport, and the difficulty of getting independent businesses on board, particularly given the current economic climate and the difficulty local businesses have in offering discounts. They also expressed concern that a pass including too many disparate elements like food and retail could become "too diluted".

"My concern is that a Cheshire-wide pass, especially if it includes food and other discounts, might become too diluted."

BID FEEDBACK

Thoughts on passes - They acknowledge potential benefits like increased footfall, exposure for lesser-known attractions, and more affordable experiences. However, the "value proposition needs to be compelling," and the offer needs a "robust, long-term strategy." They suggest including parking or transport options to enhance appeal.

Requirements for a successful scheme - Key requirements include a well-managed and sustainable offer, a robust long-term strategy, and a compelling value proposition that addresses the practicalities of getting around Cheshire. They also suggest considering accommodation providers and refining the proposal with different options to make it easier for businesses to see the potential value.

"Conversations around passes usually boil down to the local appetite and the strength of the offer."

The BID's overall support is described as "50/50," contingent on seeing more details about the strategy and practicalities. They could assist with promotion to their local audience and 435 businesses, but only with confidence in the offer's quality and sustainability.

CASE STUDIES

The Oxford Pass

The pass was commissioned and supported by Blenheim Palace, Experience Oxfordshire, and the Oxford Bus Company for a trial period of 12 months but was deemed to not be a worthwhile investment for the region. This was partly influenced by the poor timing of the pass released in late 2019, but also took into consideration other elements which meant it was not as successful as expected.

The Oxford Pass was valid for a two-day period and provided entry to a host of attractions including the Ashmolean, Bicester Village, Oxford Artisan Distillery, Oxford Castle & Prison, Carfax Tower, Soldiers of Oxfordshire Museum, and Blenheim Palace.

Additionally, the pass included unlimited travel on local bus services and participation in official walking tours and City Sightseeing routes.

- Perceived value
  - Oxford, particularly the areas served by the bus company routes, has an abundance of free attractions which meant pass holders had many options to engage in free activities whilst using the same transport links at the cost of only the transport.
  - The experiences included in the initial pass were spread across the region and, whilst they do have good transport links, the times between attractions meant it was difficult to get the full value of the pass without significant travel time.

- Stakeholder engagement
  - Those initially included in the pass were seen as “big players” by other stakeholders who struggled to see value in the pass for their smaller experiences and attractions. Whilst this made better perceived value for pass holders it did not match well with the perceptions of smaller stakeholders.
  - The pass was led by two of the areas largest stakeholders (Blenheim and City Sightseeing) which was perceived poorly by attractions who had already been approached to partner with them to sell tickets and felt they were not generous enough with the commissions due to their perceived market value.

It’s important to have 4 or 5 high vaue discounted entries for a good destination pass to make it feel high value but you can’t rely on those alone. If it’s only the major ones then the smaller venues get lost and profitability goes out the window.

The Manchester Pass

VISIT MANCHESTER PASS

The Manchester Pass is a multi-attraction pass designed to enhance the visitor experience in Manchester. Launched in 2020, the pass offers access to a variety of attractions, including museums, zoos, and other cultural venues.

Objectives of the pass

- Increase visitor spending and length of stay in Manchester.
- Enhance the visitor experience by offering convenient access to multiple attractions.
- Promote Manchester as a premier tourist destination.

Target Audience - The initial target audience focused on international travellers, particularly from Europe, the US, China, and Japan. The focus has expanded to include domestic tourists and leisure travellers.

Implementation

- Partnership - The pass is operated in partnership with Turbo Pass, a third-party company specialising in the development and management of city passes. This partnership leverages existing technology and expertise.
- Pricing - The pass is available in 1, 2, and 3-day options for adults and children.
- Sales Channels include online platforms (Visit Manchester website and various online travel agencies), Travel Agents/Tour Operators, On-site sales at participating attractions and tourist information centres, and through partnerships such as transport providers to offer bundled packages.
- Marketing & Promotion – There is no standalone campaign for the pass, instead it is integrated into broader destination marketing campaigns across various channels, including digital, print, and social media. It is also promoted through partnerships with travel agents, tour operators, and international travel publications, and leveraged through collaborations with key stakeholders, such as airlines and hotel concierges.

The Manchester Pass

VISIT MANCHESTER PASS

Challenges

- **Limited number of paid attractions** - Manchester has a relatively limited number of paid attractions compared to other cities with successful city pass programs, which can limit the overall value proposition of the pass.
- **Securing attraction partnerships** - Securing attractive discounts from key attractions proved to be a significant challenge, with initial reluctance from many partners.
- **Resource constraints** - Limited internal resources necessitated a reliance on third-party partners for the development, management, and marketing of the pass.
- **Transportation integration** - Integrating transportation options, such as public transport and airport transfers, into the pass has been challenging due to logistical and financial constraints.

"I think that the biggest thing is transport. If you include transport... The visitor walks away, thinking right well, I've got or I can go anywhere across greater Manchester. It's done, it's covered. It's sorted."

Visit Manchester

The Manchester Pass presents both opportunities and challenges. While the initial results have been mixed, ongoing efforts to enhance the pass offering, strengthen partnerships with key stakeholders, and improve marketing and promotion are crucial for its long-term success.

Key takeaways

- Securing attraction partnerships was a major hurdle.
- The lack of transportation integration is a significant limitation.
- Limited number of paid attractions in Manchester poses a challenge.
- The partnership with Turbo Pass has been crucial for operational efficiency.
- Ongoing data analysis and refinement are essential for improving the pass's success.

CONSUMER BEHAVIOUR AND FEEDBACK

CONSUMER BEHAVIOUR

City pass research

In the 2018 study 'MODEL OF A CITY DESTINATION CARD AS A MARKETING TOOL OF SELECTED EUROPEAN CITIES' five European capital cities were selected as city destinations which had the largest number of visitors in 2015: London, Paris, Rome, Prague and Vienna.

The study looked at each city's destination card model and visitor use of the cards.

Prague City Tourism reported more than 60,000 Prague Cards were sold in 2018, and the Paris Convention and Visitors Bureau reported that nearly 41,000 Paris Passes were sold in 2018.

Key findings

- **Cost savings** was the most frequently mentioned reason why the tourists chose to purchase destination cards.
- **The biggest challenge** is to make a destination card attractive when there are main attractions free of charge like in London.
- The inconvenience of free attractions have been successfully overcome by **offering additional services** with the card, and **offering longer term validity** which makes them more attractive for visits to paid attractions too.
- **Cultural attractions** were most important to have as part of the scheme.
- Equally important is the **public transportation** included as it also increases the economic value of the card.
- **Validity periods** for destination cards differ, but **longer ones have a higher value for visitors**, and help by spreading the tourist traffic across the city and attracting visitors to lesser known attractions.

Source: MODEL OF A CITY DESTINATION CARD AS A MARKETING TOOL OF SELECTED EUROPEAN CITIES © 2018 Marta Drozdowska, Magdalena Duda-Seifert, Agnieszka Faron https://www.dbc.wroc.pl/Content/43953/PDF/Drozdowska_Model_Of_A_City_Destination_Card_As_A_Marketing_2018.pdf

CONSUMER BEHAVIOUR

The 2020 study 'Tourists' motives and perceptions of destination card consumption' focused on visitors motivations when using destination cards, and the barriers to use.

Key findings

The main motives to buy were:

- **Cost savings** ('bundles' of visitor attractions and allowing visitors to travel round their destination at a lower cost)
- **Time savings**
- **'Novelty seeking'** (new ideas on what to visit/eat)
- **Recommendations**. from other people

Table 4. Motives leading tourists to purchase destination card(s).

	Freq. (%)
Motives leading tourists to purchase destination card (DC) [a]	
Cost saving:	81 (74.3%)
DC allows me to travel around the destination at a lower cost	
Time saving:	61 (55.9%)
DC offers much convenience to me when I travel around the destination	
Social influence:	38 (34.9%)
My friend(s) recommends me to buy DC	
Novelty seeking:	19 (17.4%)
DC allows me to get new ideas of what to visit	

Note. [a] Rated by respondents who have bought at least one destination card before (n = 109).

The main barriers to buy were:

- **Lack of knowledge** about the product value and benefits
- **Low value** for money
- Lack of **product availability**

Table 5. Inhibitors leading tourists not to purchase destination card(s).

	Freq. (%)
Inhibitors leading tourists not to purchase destination card (DC) [a]	
Lack of knowledge about product value:	139 (78.9%)
I did not know what benefit / value DC can offer to me	
Lack of knowledge about product availability:	60 (34.1%)
I did not know if DC is available in the destination I visited	
Social influence:	12 (6.8%)
My friend(s) does not recommend me to buy a DC	
Low value for money:	10 (5.7%)
The cost of DC does not match with the benefit offered to cardholders	

Note. [a] Rated by respondents who have never bought any destination card before (n= 176).

Source: Tourists' motives and perceptions of destination card consumption, August 2020 Tourism Recreation Research, Daniel Leung, The Hong Kong Polytechnic University
https://www.researchgate.net/publication/343743601_Tourists'_motives_and_perceptions_of_destination_card_consumption

CONSUMER BEHAVIOUR

The most important card benefits:

- Free admission **ticket to major attractions**
- A discount **on pocket** Wi-Fi **rental**
- Free use of **public transportation**

The most important added value offer were:

- **Attraction related** e.g. free admission ticket, fast track entry
- **Activity offered** e.g. shopping or food discount, discount on accommodation, theatre, tours
- **Transport** e.g. free public transport, bike rental, free parking
- **Wi-Fi**

Maps and guides seen as less important.

Table 6. Perceived importance of offerings in destination card(s).

Offerings	Total (N = 285) [a]		Past-purchasers (n = 109) [a]		Non-purchasers (n = 176) [a]	
	M [b]	SD	M [b]	SD	M [b]	SD
Attraction-related offerings						
Free admission ticket to major attractions	5.45 (1)	1.33	5.41 (1)	1.36	5.48 (2)	1.31
Fast ticket line / Fast track entry	5.29 (4)	1.41	5.31 (2)	1.43	5.27	1.39
Activity-related offerings						
Discount on shopping	5.28 (5)	1.44	5.14 (5)	1.51	5.37 (4)	1.39
Discount on restaurant consumption	5.21	1.39	5.08	1.49	5.29 (5)	1.34
Discount on accommodations	5.12	1.51	5.08	1.55	5.15	1.48
Discount on city tours	5.03	1.46	4.92	1.55	5.10	1.41
Discount on the use of public facilities	4.86	1.50	4.88	1.32	4.85	1.61
Discount on stages / concerts	4.78	1.42	4.69	1.49	4.84	1.38
Transportation-related offerings						
Free use of public transportation	5.39 (3)	1.35	5.28 (3)	1.38	5.47 (3)	1.32
Discount on airport transfer	4.93	1.39	4.86	1.49	4.98	1.34
Free use of tourist shuttle service	4.65	1.41	4.57	1.44	4.69	1.38
Discount on bike rental service	3.99	1.50	4.00	1.45	3.99	1.54
Discount on car rental service	3.90	1.59	3.79	1.59	3.97	1.59
Free use of parking facilities	3.59	1.68	3.43	1.58	3.69	1.73
Other offerings						
Discount on pocket Wi-Fi rental	5.42 (2)	1.46	5.27 (4)	1.44	5.52 (1)	1.46
Free gift voucher	5.05	1.46	5.06	1.49	5.04	1.45
Free city map	4.94	1.62	4.78	1.60	5.05	1.62
Free city guide	4.81	1.47	4.78	1.51	4.82	1.45

Note: [a] 7-point Likert scale was used (1: Extremely unimportant – 7: Extremely important).
[b] Numbers shown in the parenthesis represents the rankings of the offerings (only top five are shown).
M = mean; SD = standard deviation.

Source: Tourists' motives and perceptions of destination card consumption, August 2020 Tourism Recreation Research, Daniel Leung, The Hong Kong Polytechnic University
https://www.researchgate.net/publication/343743601_Tourists'_motives_and_perceptions_of_destination_card_consumption

CONSUMER FEEDBACK

Why Reviews?

It’s important we look at feedback for other similar products across the industry to gauge what consumers are interested in, and what they like and do not like about a similar product, so we can gauge what will swing that consumer in the direction of purchasing a particular product.

Many attractions are poor at understanding the market needs of their visitors and extremely poor at understanding the potential visitors that make the decision not to visit or purchase a product.

They may survey or ask for feedback when a guest visits, but they do very little research into those who do not visit and thus they assume consumer behaviour based on those who do eventually purchase. This is particularly difficult when attractions do not have a comparable product to link with any new product i.e. they have not participated in a pass product before.

There are plenty of comparable products to passes which would be suitable for sale by Visit Cheshire across the world. We can look at these reviews to identify what influences consumer behaviour, what delights visitors, and what will stop them from purchasing in the first place or repurchasing another pass in the future.

We have summarised feedback with similar themes to those mentioned by stakeholders and software vendors and compiled them into themes below.

CONSUMER FEEDBACK

Itinerary planning

Feedback included the want to be able to pre-plan an itinerary including average travel times. For those who are coming to the city for the first time especially, it's sometimes unclear how long travel between attractions will take and they can overbook attraction entry.

Verified Nov 27, 2024

I have mixed feelings about this 3 days...

I have mixed feelings about this 3 days pass, because I ran all day from an "must see" to another, the main important ones are not grouped and it is a bit difficult to plan in a way that those 350 pounds to worth. After 11 attractions seen, costs was roughly the same as if a paid as a regular visitor. Maybe if this pass will cover even the transport facilities in the future or would include more

It was challenging making an itinerary schedule. I wish there was a way to plan your day on the app. Many of the tours and open hours overlapped. I had to work harder than ideal to make sure I didn't accidentally double book myself and generally just had to be careful of my availability.

"For Edinburgh we wanted to include a lot of things across the city to encourage people away from 'the highlights' - think of it like insurance, you don't want every purchaser to get 200% value, you need to spread the volume across your attractions to get a profitable mix."

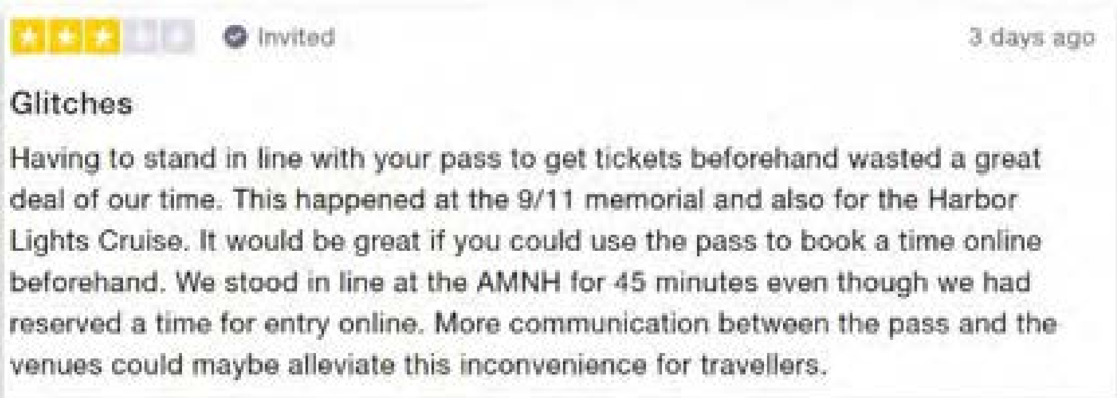
"We find the free and paid trails of attractions to be very popular with out of town visitors in particular. They can follow a pre-planned trail or find locations with travel times and that helps them get oriented."

CONSUMER FEEDBACK

Non-automated and integrated ticketing

Many negative reviews mentioned issues with non-automated ticketing meaning that passes needed to be sent out, picked up or exchanged causing hassle for the attraction and the customer. Ticketing needs to be automated to allow customers to buy and receive tickets in real time and redeem them in a timely manner.

There is also a want from attractions to link to their current booking systems to reduce potential overbookings and help with managing their businesses. Being able to send pass information, timed bookings and other important information reduces the friction customers can feel when using a city pass product.



Invited 3 days ago

Glitches

Having to stand in line with your pass to get tickets beforehand wasted a great deal of our time. This happened at the 9/11 memorial and also for the Harbor Lights Cruise. It would be great if you could use the pass to book a time online beforehand. We stood in line at the AMNH for 45 minutes even though we had reserved a time for entry online. More communication between the pass and the venues could maybe alleviate this inconvenience for travellers.

"Managing timed-entry may require API integration between your reservation system and the pass providers' system, or the ability to enter the pass number at the time of booking."

ARIVAL

CONSUMER FEEDBACK

Pre-booking

Negative feedback of all passes included the need to pre-book attractions but being unable to do this in advance, online. Since 2020 it has become more likely that attractions require pre-booking and so this needs to be addressed to ensure customers don't see this as a reason not to purchase.

Invited 18 hours ago

Good but one downside

First of all, the GoCity pass saved us money and the wife and I liked how we had such a wide variety of experiences available at our fingertips. The one downside is that you are unable to book things in advance. We had to travel across the city to see if we could get in to the attraction as soon as possible. If I had booked on my own, I would have been able to buy passes and select time slots in advance which would have helped us plan our trip better/avoid the stress of when we would be able to get in.

"The redemption process would be the biggest stumbling block, making it work with our core product, which is theme park tickets. It would need to work with dynamic pricing or be applied only to the gate price."

GULLIVER'S Theme Park Resorts

ARIVAL

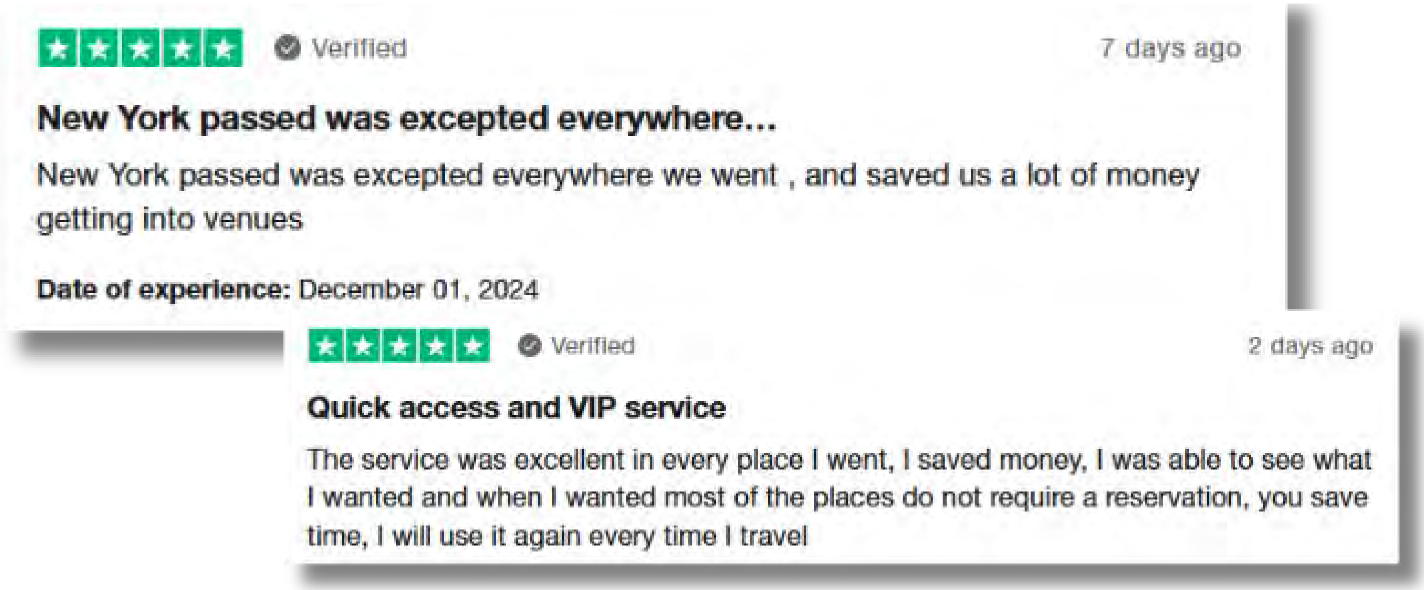
"By purchasing a pass, travellers can have access to a range of activities without necessarily committing to one or another, or having to purchase a specific ticket for a set time or departure. This is a key selling point for travellers who want the flexibility to choose their activities day by day."

CONSUMER FEEDBACK

Value for money

Positive reviews include mentions of value, money saving and being able to understand the savings they had made by purchasing the product. The perception of value contributed to a positive experience.

When discussing perception of value for money with other pass providers and trade specialists, it was discussed that value across the customer base could be very different but the perception was the main focus.



Verified 7 days ago

New York passed was excepted everywhere...

New York passed was excepted everywhere we went , and saved us a lot of money getting into venues

Date of experience: December 01, 2024

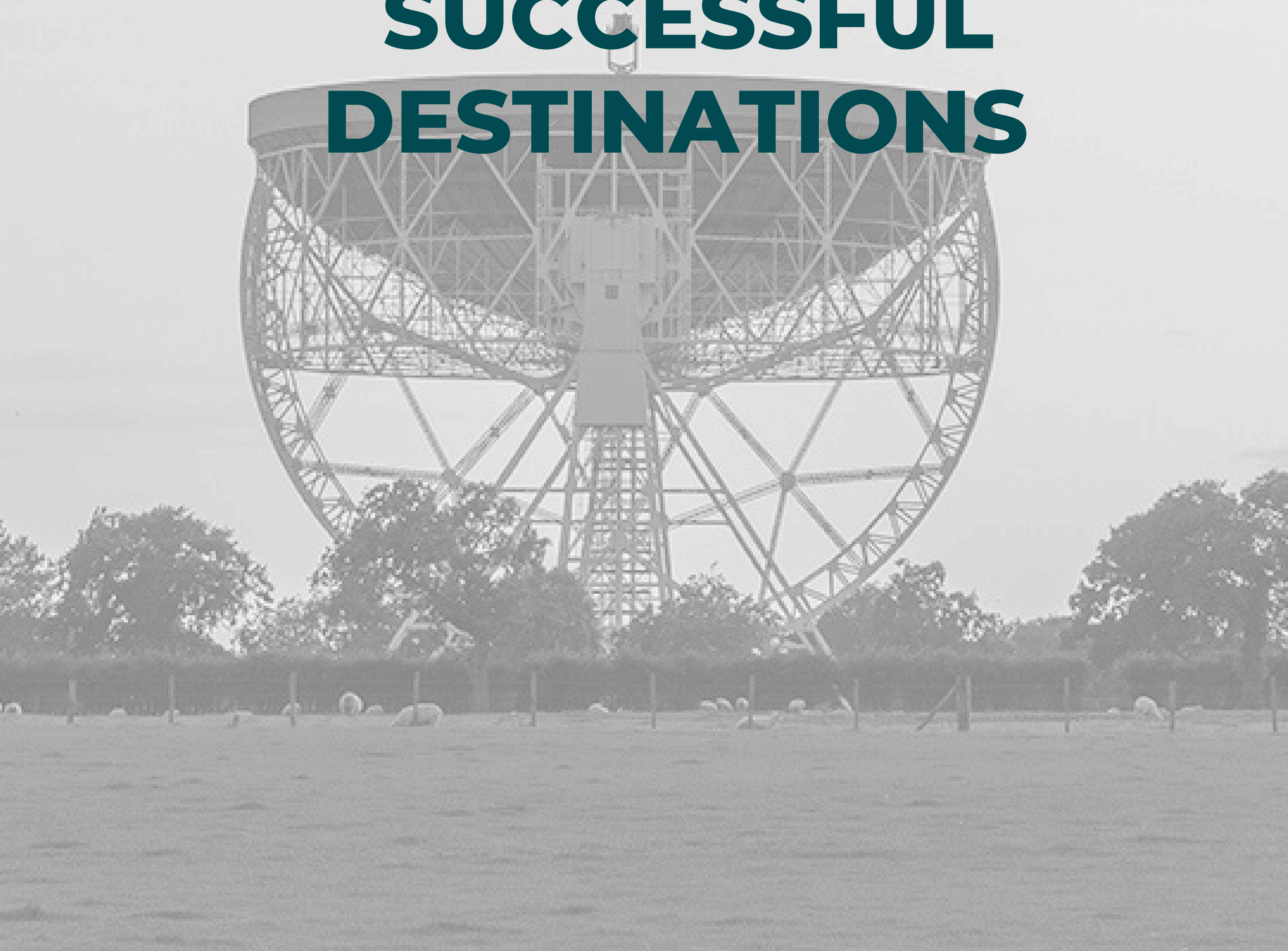
Verified 2 days ago

Quick access and VIP service

The service was excellent in every place I went, I saved money, I was able to see what I wanted and when I wanted most of the places do not require a reservation, you save time, I will use it again every time I travel

"To get the right value mix in your city pass you need to make sure your 'must visit' attractions are geographically spread with the smaller attractions filling the gaps in volume. The value those smaller attractions bring cannot be overstated and will give you much better perception than a discount on the 'must visits'."

SUCCESSFUL DESTINATIONS



SUCCESSFUL DESTINATIONS

During our conversations with software vendors there have been many opinions about the content of the product and variables in each destination such as visitor mix and price consciousness. However there have been three main learnings which have come up with each software vendor and backed up what we have heard from the DMOs and stakeholders.

Ease of technology

All vendors mentioned that ease of use was top of mind for both customers and stakeholders. Clunky technology was regarded as a huge pitfall for both the pass vendor, pass user and experience supplier.

Passes that required pre-booking where only favoured where there was a solid API in place where the booking could be made online, in advance with no inconvenience to the guest. Voucher redemption and physical reconciliation were mentioned by multiple vendors as “old-fashioned” and unreliable for both partners.

Geographic and economic spread of experience suppliers

Pass products they considered to be successful benefitted from a large range of experience both in terms of geographic spread and also spread of size and/or cost of the experience.

Successful passes were noted for having a range of experience from small volume, low cost walking tours through to large “must see” attractions across the destinations.

Successful destinations were also noted for having a mix of lower cost, high volume attractions within a short travel time with the higher cost attractions at a longer travel time to ensure the mix remained in favour of pushing volume towards smaller attractions within the destinations.

“Annual attraction visits via MAPs in 2019 likely topped 30 million with around 12% of US and European travellers using pass products.”

ARIVAL

The Visit York Pass (Open Pass)

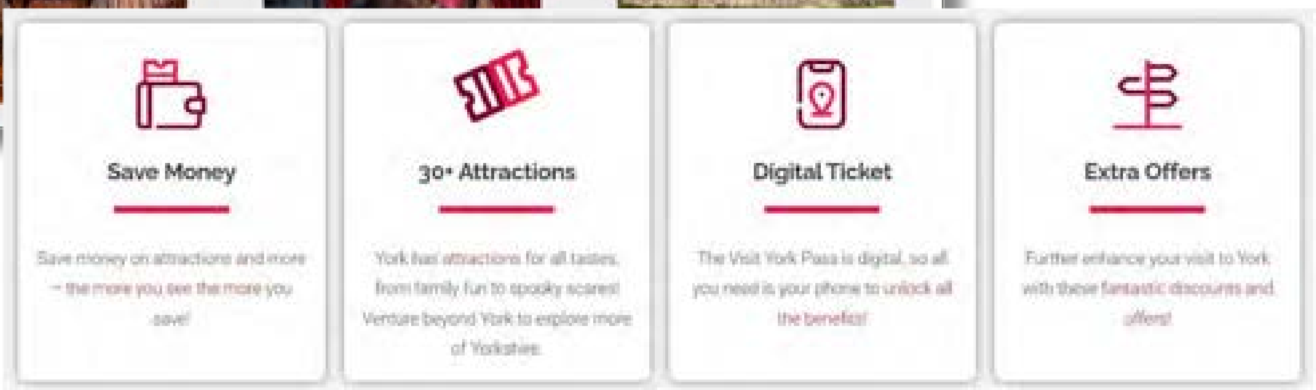
The Pass from Visit York is provided by OpenPass and was mentioned by many stakeholders and pass providers as a successful example of a destination pass. It covers mainly the city centre with attractions within walking distance however also includes some experiences within a 1.5 hour drive time which are included in their suggested itineraries for longer stays.

The York Pass offers visitors the chance to explore over 25 of York's top attractions, along with some sites outside the city. Key attractions included: York Minster, JORVIK Viking Centre, York Dungeon, and Clifford's Tower. You can also enjoy experiences like a city sightseeing tour, a river cruise, and more.

The pass is available in different durations (1, 2, or 3 days), making it flexible depending on the length of your stay. It also provides some extra benefits like discounts at local restaurants and other exclusive offers to enhance the perception of value.

Pricing

- 1-day pass: £60 for adults, £35 for children.
- 2-day pass: £80 for adults, £50 for children.
- 3-day pass: £95 for adults, £55 for children.



The London Pass (Go City)

The London Pass is a popular sightseeing pass offering access to over 97 attractions across the region, it's ideal for travellers who want to explore a lot in a short period and save on individual entry fees.

The pass is available for durations ranging from 1 to 10 days, and it's entirely digital, allowing you to access attractions through a mobile app.

The London Pass provides access to over 97 attractions, tours, and experiences across London including Tower of London, The View from The Shard, London Zoo, Westminster Abbey, The London Eye, St. Paul's Cathedral, Tower Bridge, Shakespeare's Globe Theatre Tour, Kensington Palace, and Hampton Court Palace which are geographically spread. The pass also includes travel specific experiences like a Thames River cruise, guided walking tours, and a hop-on hop-off bus for easy city exploration.

Pricing

- 1-day pass: £104 for adults, £69 for children.
- 2-day pass: £144 for adults, £89for children.
- 3-day pass: £169 for adults, £109 for children.
- 4-day pass: £179 for adults, £109 for children.
- 5-day pass : £ 194 for adults, £119 for children.
- 6-day pass: £209 for adults, £124 for children.
- 7-day pass: £219 for adults, £127 for children.
- 10-day pass: £254 for adults, £144 for children.

Go City also offer a money back guarantee which can help improve the perception of value pre-purchase where guests might worry they will not see the value of the pass once they are in the destination.

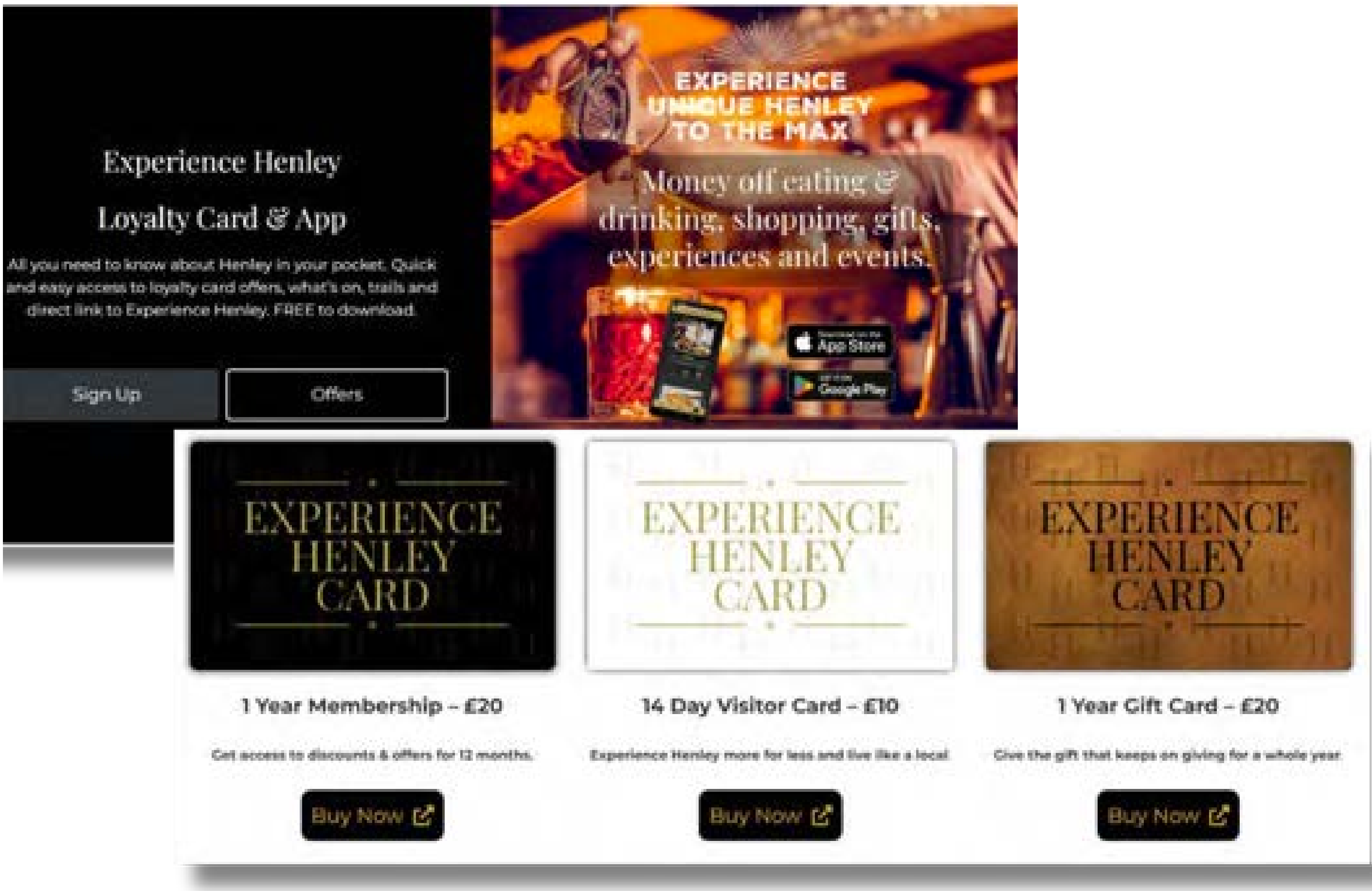
Experience Henley

Experience Henley is a destination card with a difference. Instead of focusing on free entry to attractions with experience suppliers it offers discounts and calls to action across many retailers and experiences such as high street stores, cafés, and spa and leisure facilities across Henley.

The business model is to charge a yearly fee to join the card as a supplier and then to charge a small amount to each 'pass holder' to join the scheme for either 1 year (aimed at residents) or 14 days (visitor pass). Suppliers can change their offering through the year which they find helps smaller businesses stay on top of the 'loss' to their business and makes it less daunting to pay a one off fee rather than a 'commission'.

Whilst this doesn't fit the mould for a standard 'destination pass' it has been incredibly successful with the team now rolling out to other areas outside of Henley with the same technology and business model.

Their option for both locals and visitors allows them to collect data on both markets and adjust products accordingly, and they have found this especially useful at times when Henley is busier with tourists (such as during the Henley Regatta) as a tool to monitor visitor behaviour and collect data.



Alabama Pass (Bandwango)

The Alabama Tourism Department created the “All-In-One” attraction passes to encourage visitors to stay longer and see more.

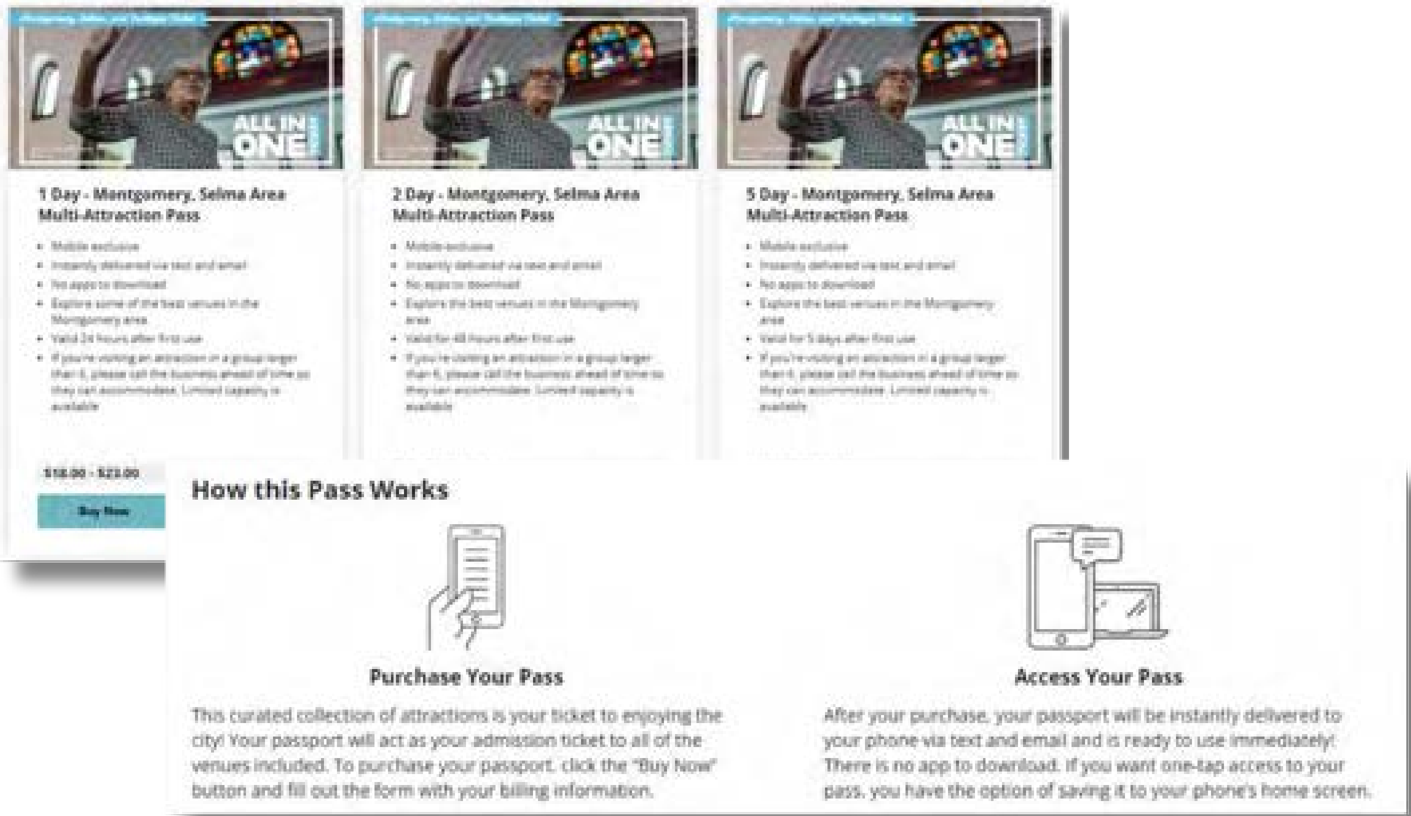
The tickets can be purchased in 1, 2, 3, or 5-day passes depending on which area pass is purchased and are priced between $18 - $89 per pass.

The regional approach of these passes could work well for Cheshire with an emphasis on exploring different parts of the county over different days in the destination.

The pass generated over $140,000 in it’s first 18 months of operation and the trial allowed the DMO to create new products based on the data collected during the trial.

“The Alabama Tourism Department believed a ticket package that could be bought during the planning stage of a trip, as well as once someone is in one of our cities, would increase tourism and the tourism spend in Alabama,” Grey Brennen of Alabama Tourism Department.

Sweet Home Alabama



The Visit Manchester Pass (Open Pass)

The Manchester Sightseeing Pass, also known as the Visit Manchester Pass, offers access to a variety of the city's top attractions while helping visitors save on entry fees. Pass holders can choose from 1-day, 2-day, or 3-day passes, which allow entry into up to 13 different attractions, plus discounts at over 30 locations, such as restaurants, hotels, and tours.

Some of the most popular attractions included are:

- The National Football Museum
- SEA LIFE Manchester
- Manchester City Stadium Tour
- The Spirit of Manchester Distillery
- Coronation Street Experience

The pass also offers discounts on experiences like East Lancashire Railway and Chester Zoo, as well as numerous dining spots and shops across the city.

Pricing

- 1-day pass: £79 for adults, £60 for children
- 2-day pass: £99 for adults, £75 for children
- 3-day pass: £119 for adults, £90 for children

These passes provide significant savings compared to paying individually for each attraction. For example, a 2-day pass could save you over £60 per person if visiting a selection of key attractions.

Open Pass provide the software platform and manage the whole venture on behalf of Visit Manchester.

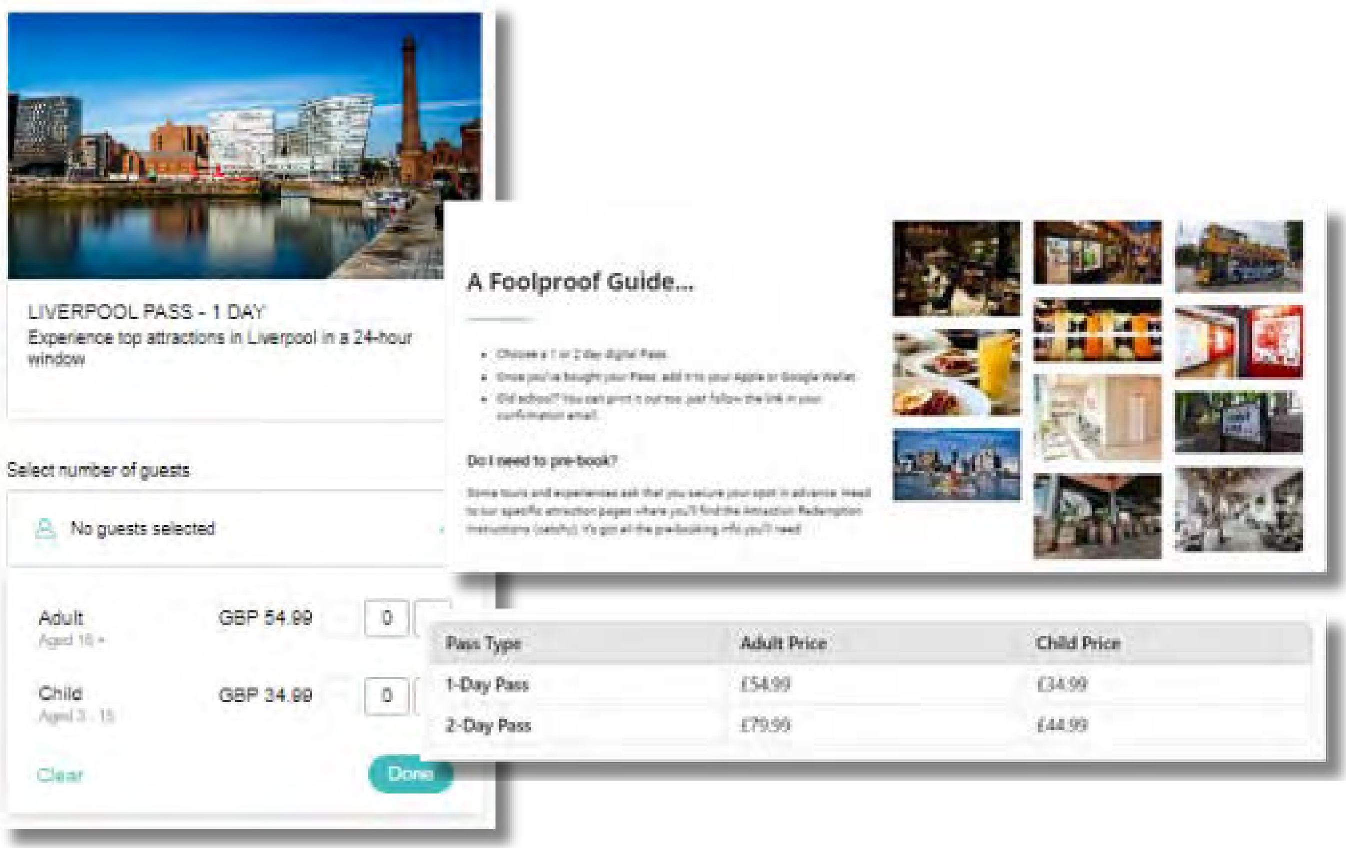
The Liverpool Pass (Prioticket)

The Liverpool Pass is a convenient digital sightseeing pass that provides visitors with access to some of Liverpool's top attractions, allowing for a cost-effective and flexible exploration of the city. You can choose between a 1-day or 2-day pass. The pass becomes active upon your first visit to an attraction and allows you to visit as many included attractions as you wish within that timeframe.

Attractions include The Beatles Story, British Music Experience, Anfield Stadium Tour, Strawberry Field, Mersey Ferries River Explorer Cruise, and the City Explorer Hop-On Hop-Off Bus Tour.

The Liverpool Pass is designed to offer significant savings compared to purchasing individual tickets for each attraction. Many reviews highlight its value for money and the convenience it offers

Pass holders also receive exclusive offers, such as 20% off meals at selected restaurants, and discounts on merchandise from the Liverpool Tourist Information Centre.



SOFTWARE VENDORS

SOFTWARE VENDORS

Software Vendors

Over the next few pages we have summarised the software vendors who have experience of providing pass products to the tourism industry, particularly relating to DMOs.

Each software vendor has their own product, pricing and way of working which can make them more or less able to suit your needs for providing a pass product for Cheshire.

Some offer traditional destination passes which give free entry to a number of attractions over a period of time, whilst some have gone a slightly different route which we think would still be useful to Marketing Cheshire.

Some offer full service contracts where they run everything for you from the contracting of attractions and experience suppliers through to working with distributors to sell the pass on your behalf.

Some offer a “white label” product which allows you to brand the pass solely to the Visit Cheshire brand with no way of knowing who is providing the service. This can be a cheaper option however it will require a larger amount of administration within your own team.

Each software vendor will be happy to help you look at your visitor mix for the whole destination, work up pricing and contracts. We would recommend this as the next step in your journey to hep you identify what data you need to make the decisions on product, pricing and distribution.

Open Pass

Open Pass provide the most recommended pass product we heard about during our meetings with stakeholders, The York Pass. The technology is specifically aimed at destinations wanting to offer a pass product and they currently have 12 destinations using their “Turbopass” product.

Open Pass’ portfolio of multi-attraction passes includes the Edinburgh City Pass and the Shakespeare’s England Explorer Pass. Furthermore, Open Pass has evolved into a powerful tour booking system too and is now managing the tours for several DMOs including Visit Cambridge and Experience Oxfordshire.

They work closely with destinations to onboard both suppliers and sales partners, ensuring exposure to markets across the globe through connections to third party sellers. They can offer a full service option for destinations where they essentially do all the work on the destination on behalf of the DMO, assuring success.

Open Pass provide

132k Tickets sold through Open Pass each year, 12 destination

2013 Working in the industry since

Bandwango

Bandwango were launched in 2012 for ski destinations to allow distribution of ski passes for resell across the resorts and digital platforms. They have since grown to cover numerous destinations across the US, and are now expanding into the UK,.

They offer a number of options from traditional destination passes with free entry across a time period for distances such as Alabama and Salt Lake City, to free trails and collection challenges for BIDs such as Bakersfield Brewery Trail.

As they are new to the UK market, they have a new destination in the UK coming on board in 2025, they have some learnings to bring from the US they currently cover, many of which are similar to Cheshire in terms of attraction and geographical spread. They are also keen to make new partnerships in the UK and increase their footprint in the region and so are much more open to negotiation as they emerge into a new market.

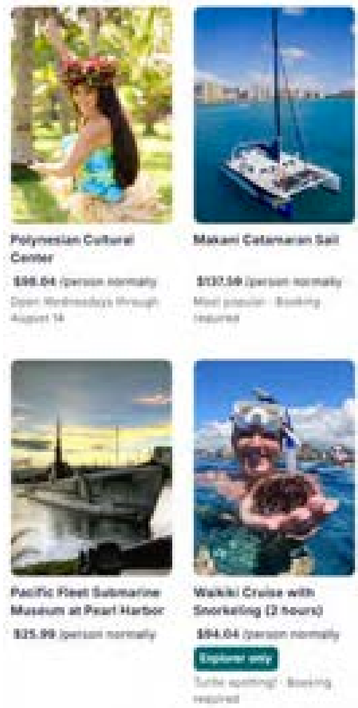
Bandwango provide

500+ Customers utilising paid passes, free trails and marketing products

2012 Working in the industry since

Go City

Go City offer a large number of destinations across the world as part of their pass product. Destinations have different offerings depending on their chosen set up and the ability to white-label the app means each destination looks unique.



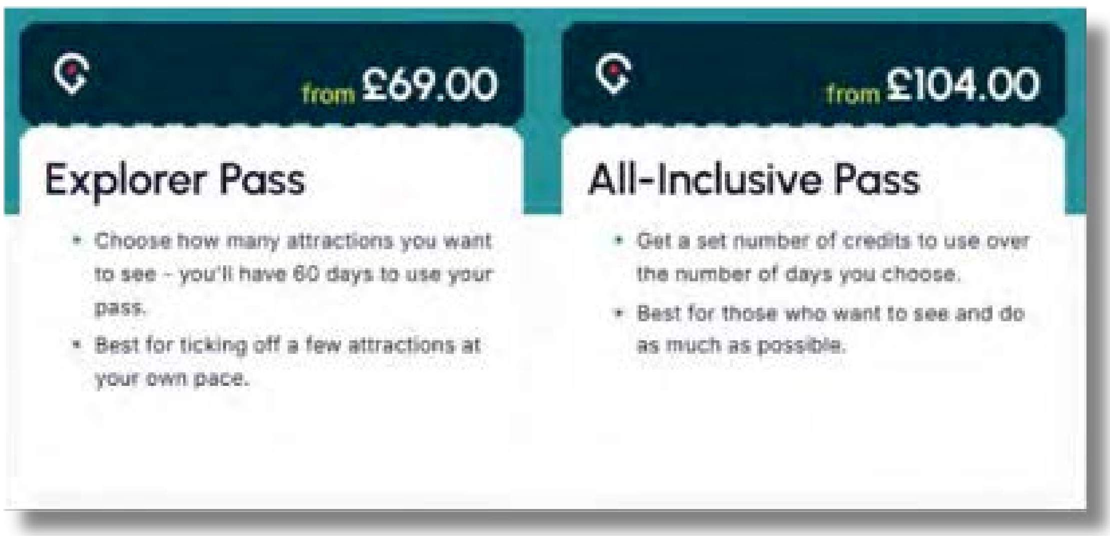
Many of their most well known passes, including London, has more recently changed to a credits based system effectively limiting how much 'value' a customer can have - whilst it still offers great value it does ensure the pass isn't undervalued versus the amount each attraction costs to the pass provider.

Redemption is via QR code downloaded in an app and scanned on entry to the attraction involved, some attractions require pre-booking which is done via API to ensure ease of guest journey.

Go City Provide

28 Current destinations covered

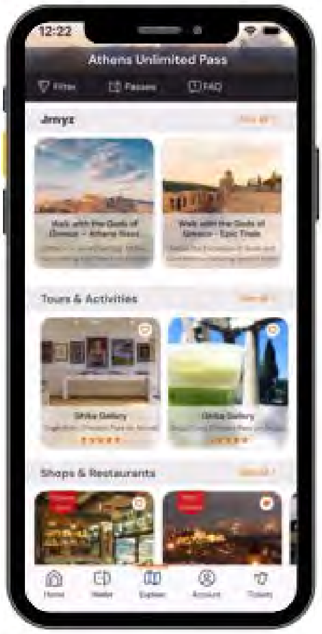
1999 Working in the industry since



Credits values

Each All-Inclusive Pass is a credits package with a credits value, based on the duration of the pass – 1 credit is worth £1 and your credits are redeemed when you enter attractions, reducing by the amount of the standard gate price of the attraction you enter. For example, with a 5-day Adult All-Inclusive Pass you can visit attractions up to a credit total of 780 credits, which is a total attraction cost of £780.

Smartvisit



Smartvisit are an Australian based tourism specific product which allows white labelling of a number of solutions that fit Cheshire's needs. They work with destinations across the globe from Dubai to Hollywood. In the UK they support Merlin Entertainments and City Sightseeing marketplaces.

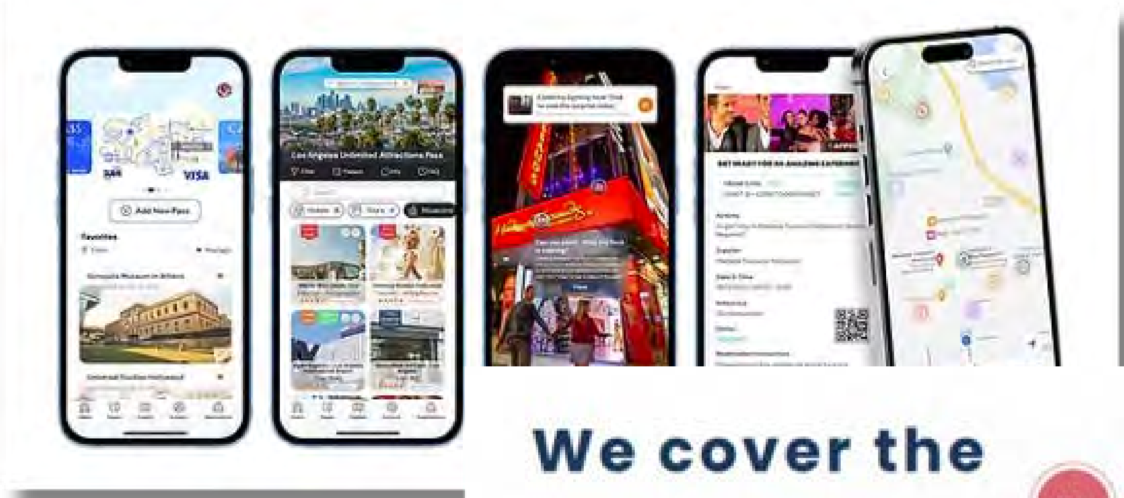
They provide a solution for creating and managing destination experiences that combine tours and activities with digital content such as a traditional destination pass. Alongside an option for loyalty programmes to reward app users even when a pass is not purchased.

They also offer an itinerary mapping option called Jrnyz which has geolocation within the app so you can offer self-guided walking or driving tours between attractions and map out a journey to include stops at attractions included in the pass product.

Smartvisit

24/7 Support services including chat and AI supported helpdesk for pass holders

2001 Working in the industry since



City Sightseeing

City Sightseeing are the worlds leading hop-on hop-off bus tour operator and cover many cities around the world for both hop-on hop-off bus transport, but also as a pass provider covering tourist attractions across those cities.

They work with the Ventrata platform to resell attraction tickets linked to their own pass products, allowing tourists to see the city and also combine purchases for top attractions.

Each destination is sold slightly differently with options specific to those cities and their layouts. From 24 hour passes including some audio tour downloads, through to 5 day passes including high value experiences.

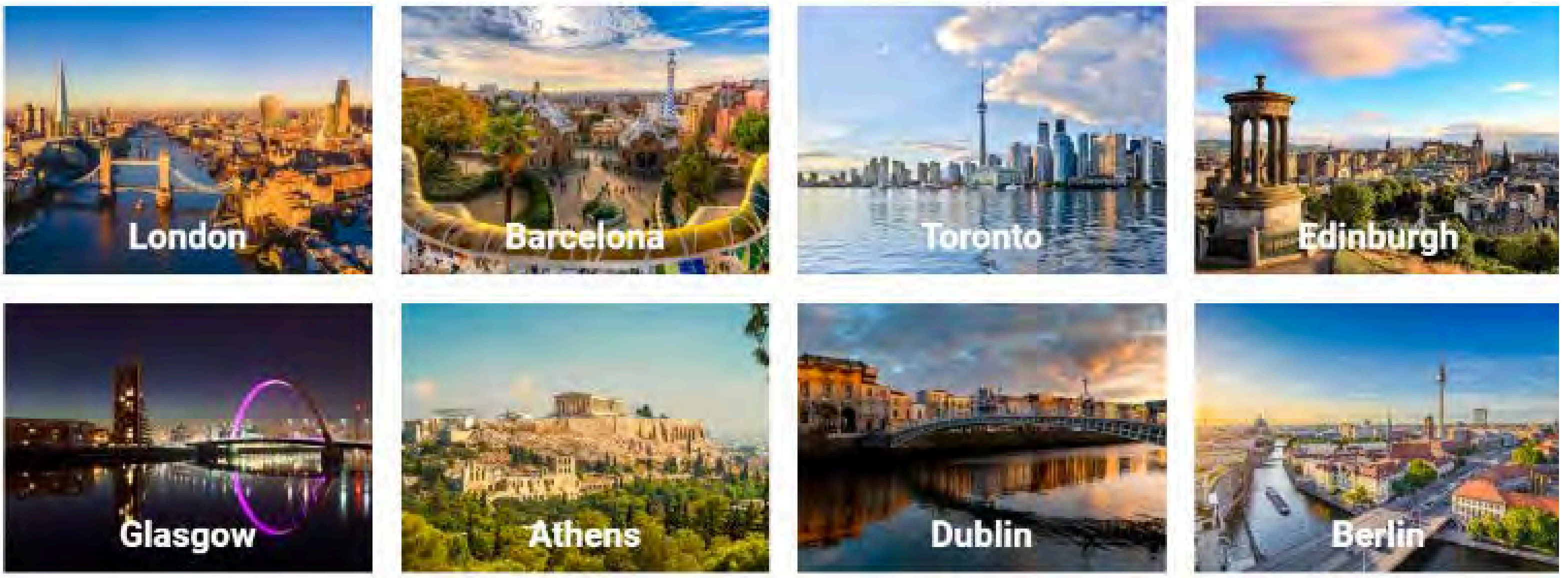
As City Sightseeing already operate in Chester they may be a good fit for a trial pass product without too much investment from Visit Cheshire required.

City Sightseeing Provide

100 Current destinations covered

1998 Working in the industry since

Top Hop-On Hop-Off Destinations



VENDOR NEXT STEPS

PRICING THE SOFTWARE

Pricing the software

After speaking with software vendors who support destination pass platforms we have concluded that currently Visit Cheshire does not have sufficient data on the market or potential product contents to be able to accurately price an offering. Though we have made some assumptions about product and market to be able to work up some figures for cost of software and potential market.

In order to improve the accuracy of these models Visit Cheshire will need to provide further data and information to the potential partners and we are happy to assist with the introductions to those as needed.

These are the things software vendors need to know before they can work up more accurate prices:

- Visitor mix of day trips versus overnight stays
- Visitor numbers for the region the pass will cover
- Which attractions will be included and their lead price
- What type of pass is required to fit the market
- Where the pass will be sold and commissions expected

Many of the pass software vendors also work in the market themselves on behalf of other destinations and so they can gauge what products would be appropriate from the visitor data and assist with working out what products will work for your market. The pricing we have provided is standard pricing but once you have more data to share then each vendor will be able to help with pricing and modelling potential revenue/costs more accurately.

Some vendors were unable to give any pricing based on the information we provided but we have included the pricing we have received in the following pages.

PRICING - OPEN PASS

Implementation Costs

Implementation Costs include:
Website Design and Creation
E-Commerce Shop and Payment Gateway Set Up
City Pass Creation and Configuration
Tracking and Reporting set up
Supplier and Distributor Account Creation
Distributer and Supplier Portal set up
Consultation and Insight from experts throughout

They estimate implementation taking 3 - 6 months and costing approx £28,000 - £48,000 depending on the complexity of the product and the sales channels required. We would expect Visit Cheshire to fall in the middle level of complexity with costs for approx £37,000 and timeline of around 4 months.

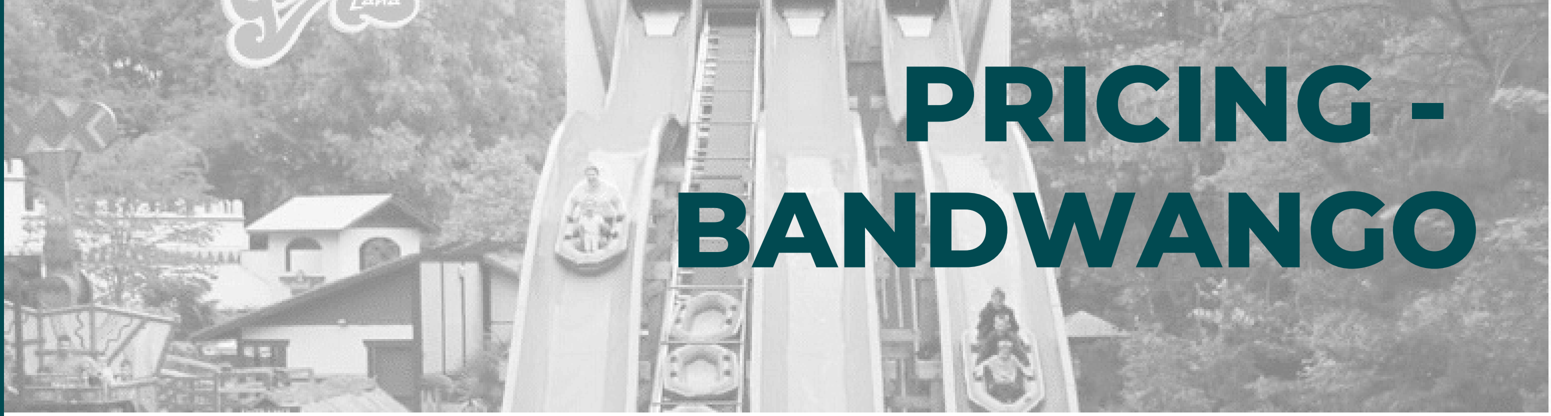
Ongoing Fees and Commissions

Service Fees include:
Platform Licenses and Standard Pass Features
Unlimited administration users
Account Manager
Platform Updates and New Features
Analytics and Reporting
Access to existing Channel Managers
Distributer and Supplier Portals
Technical Support

We believe Visit Cheshire would be within the Low or Medium complexity levels based on our current understanding.

You may also add on the Turbopass distribution network with 25% commission on all sales generated there.

Fee Structure	Fee Structure								
	Complexity Levels			Complexity Levels			Complexity Levels		
	Low			Medium			High		
	Option 1	Option 2	Option 3	Option 1	Option 2	Option 3	Option 1	Option 2	Option 3
Min. Yearly Guarantee	£ 10,000.00	£ 10,000.00	£ 10,000.00	£ 15,000.00	£ 15,000.00	£ 15,000.00	£ 20,000.00	£ 20,000.00	£ 20,000.00
Fix Fee Monthly	£ 450.00	£ 600.00	£ 750.00	£ 675.00	£ 900.00	£ 1,125.00	£ 900.00	£ 1,200.00	£ 1,500.00
Fix Fee Yearly	£ 5,400.00	£ 7,200.00	£ 9,000.00	£ 8,100.00	£ 10,800.00	£ 13,500.00	£ 10,800.00	£ 14,400.00	£ 18,000.00
Variable Fee (depending on the Sales potential)	5%	4%	3%	4%	3%	2%	3%	2%	1%



PRICING - BANDWANGO

Implementation Costs

Bandwango costs are charged per ticket with no upfront costs. This is a great model for trying new products or testing the market. In order for them to create indicative costs they have provided the following modelling for a pass for Cheshire. This is a good guide for how much you could charge and make on a traditional tourist pass for Cheshire,

Pass	Category	Price	Visits	Payouts	Fee	Profit	Margin
1 Day	Adult	£79.00	2	£56.00	£7.90	£15.10	19.11%
	Child	£69.00	2	£53.60	£6.90	£8.50	12.32%
3 Day	Adult	£199.00	7	£147.48	£19.90	£31.62	15.89%
	Child	£149.00	7	£121.96	£14.90	£12.14	8.15%

Bandwango were provided with high level data about the price of attractions that might be included, the size of the visitor market and the population of Cheshire and this informed the pricing. The walking food tour, which was on outlier for costs, but would like to be included was included as a separate add-on product due to its significantly higher ticket value compared to the other attractions.

With 15,000 monthly views and a 1% conversion rate, approximately 150 passes should be sold each month, generating £18,600 in revenue.

After deducting Bandwango and merchant expenses, the gross profit is £2,579, with an average pass margin of 13.87%. Once platform and marketing costs of £1,829 are subtracted, the net profit is £750 per month. However, this figure does not account for staffing or other operational costs, which could impact overall profitability.

Monthly Purchase Page Traffic (Unique Page Views)	15,000
Conversion Rate (Page Visit --> Transaction)	1.00%
Average Cart Value	£124
Total # of Monthly Passes Sold	150
Total Monthly Gross Revenue	£18,600
Average Pass Profit %	13.87%
Total Monthly Gross Profit (After Bandwango + Merchant Expenses)	**£2,579**
Monthly Badwango Platform Fee Expense	-£899
Monthly Marketing Expense	-£930
Total Monthly Expenses	-£1,829
Monthly Net Profit/Loss	£750

PRICING - SMART VISIT

Implementation Costs

Implementation Costs include:
App Design and Creation
E-Commerce Shop via App
City Pass Creation and Configuration
1 embedded JRNYZ's tour
Tracking and Reporting set up
Consultation and Insight from experts throughout

They estimate implementation taking 3 - 6 months and costing approx £20,000 for a single JRNYZ|'s tour and one pass product using their standard website layout and standard app.

Ongoing Fees and Commissions

Service Fees include:
Platform Licenses and Standard Pass Features
Unlimited administration users
Account Manager
Platform Updates and New Features
Analytics and Reporting - CRM Integration if required
Technical Support

The sales team estimated a 5% fee for each pass sold to cover the ongoing costs, depending on projected sales targets during sales negotiation there will be a floor limit for ongoing fees which will sit somewhere between £10,000 and £20,000.

VENDOR NEXT STEPS

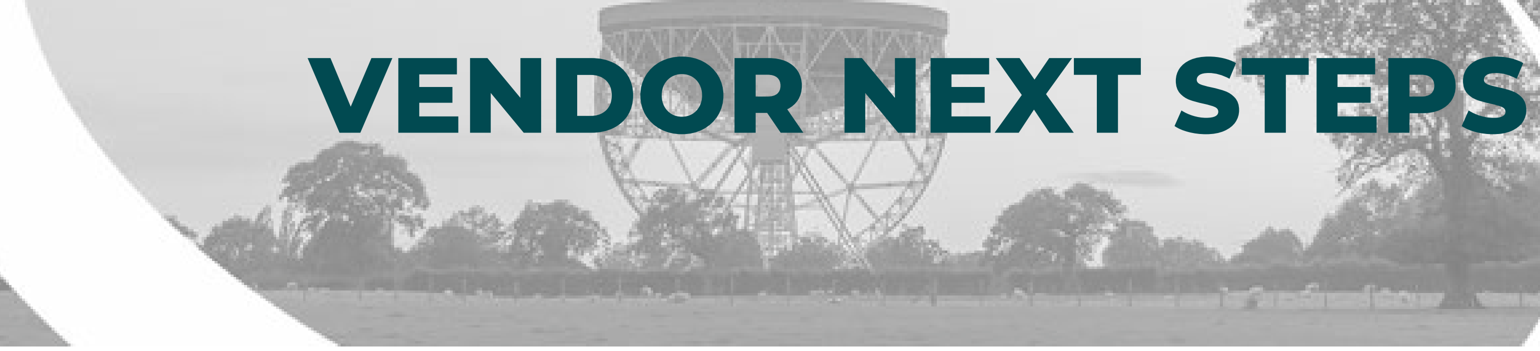
Implementation timelines

For most of the software vendors we spoke to they would be looking at around a 6 - 12 month timeline from initial engagement to launching the product into the market. If you chose to work with a partner who undertook all of the work of the pass this could be expedited, however all steps need to be undertaken and you would still require 4-6 months even with a full service SAAS provider.

Across the board there are options for working with different vendors who can offer differing levels of resource and support. From taking the whole project on for you with partners such as Bandwango and Open Pass, through to using a white-label pass solution and building a team within Visit Cheshire to manage the pass, bring partners on board and provide customer service.

Given the resources needed we would suggest looking at how other cities are working with their tech partners, and understanding what your commitment would be under each vendor will be required. Whilst a full service option will increase the cost in the first instance it may save time and money in launching and longer term support needs.

Many vendors proposed that a trial period to test the market was the preferred solution with them providing a higher level of support until the trial was completed while a new, more informed way of working together could be finalised knowing more about your needs and the products that worked.



VENDOR NEXT STEPS

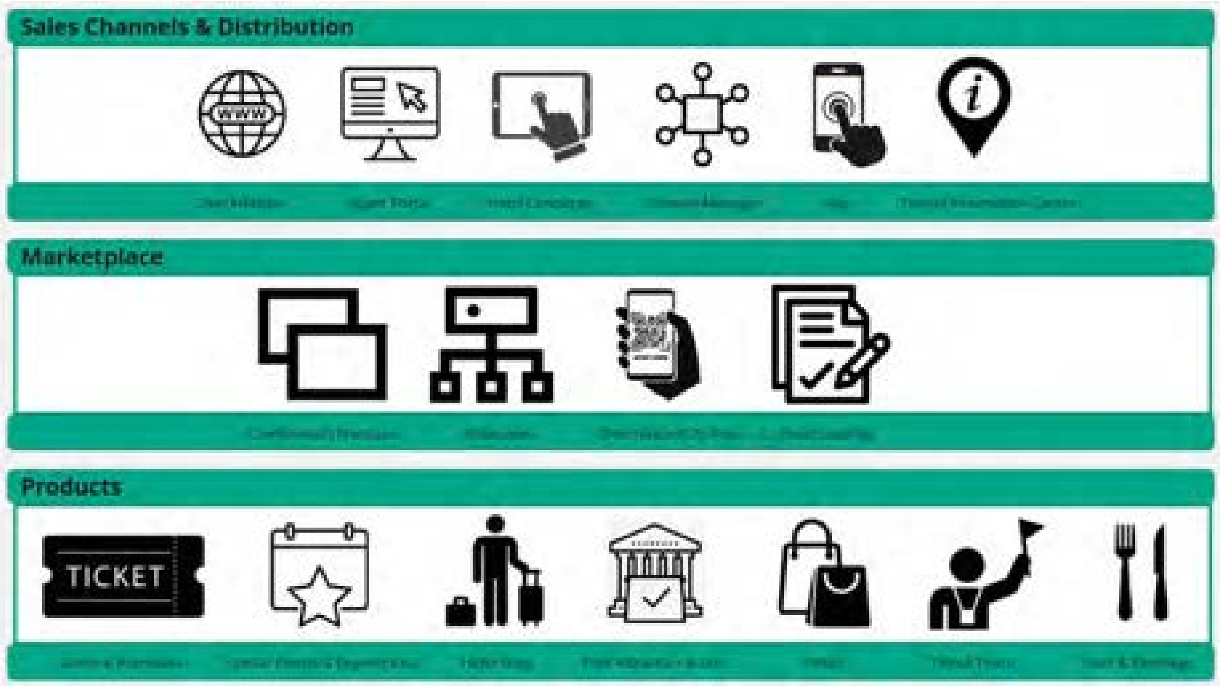
These 6 months would consist of:

- Creating a product - Brand name and product proposition
- Data gathering - All suppliers will require data gathering to be undertaken prior to any work being done to ensure pass success.
- Contracting suppliers - With any of the suppliers who will be working with you on the pass i.e. attractions, hotels etc.
- Technical implementation - Setting up links to the attractions bookings systems, ensuring connections were present and working on any new integrations which were needed.
- Contracting resellers - Working with resale partners such as TripAdvisor, Get Your Guide etc should you chose to do so to ensure your pass gets the best launch possible at the best rates of commission.
- Testing and training - Ensuring all the connections work on your systems and that teams are trained (in both attractions and Visit Cheshire) to supply the system as needed.
- Launch - Most vendors would require a soft launch with sales only via your own branded website initially prior to mass launch, though this time should be days rather than weeks.

"Running it on your own requires resources, including customer service and financial management, like paying suppliers. Even for a small team, this workload can be significant. However, over time, the process becomes smoother as everyone learns."

Open Pass

VENDOR NEXT STEPS



Product and distribution

For all stages you should be looking to sell passes through a dedicated website branded with the pass brand and with options to buy directly from Visit Cheshire. This may also include an app depending on the software you choose to utilise but app downloads are less likely when the pass is a one-off irregular purchase for tourists so bear this in mind when comparing products. Engagement with any tourist destination centres or local tourist orientation services should be seen as vital in ensuring the pass is seen as something supported by ‘the destination’.

An agent portal on your own website would also give you the option for signing up smaller resellers such as local travel agents, taxi drivers, bus operators etc who will sell your passes on your behalf with a login or code allowing them to claim commission for promoting the pass.

During the start up period it will be beneficial to work with established partners to ensure maximum exposure for the pass product. Working with partners through a channel manager which will connect you to other sales platforms such as Trip Advisor, Get Your Guide, and with relevant influencers through API portals where other parties can market and sell your product on your behalf for a commission.

Once established you should look to engage hotels in selling the pass product through their concierge services and packaging with their stays to ensure maximum impact on those staying in the area for more than one night. There may be opportunity to increase overnight stays by adding the pass as an incentive to longer stays, which would be both beneficial to the pass uptake and to the hotels selling the pass. This would also be a good way to approach hotels to join the pass scheme and share value once you’ve proven the product.

VENDOR NEXT STEPS

Understanding pricing and market value

Different destinations across the world are using a distinct mix of product, customer insights and overall market value to ensure they find the right price for their products and the visitors that purchase them.

For some markets, where visitors may be more cost-conscious, less expensive and more exclusive attractions make for better experiences - prioritising 'off the beaten track' experiences that are low cost but high impact.

In a market where visitors have a lot to fit in but are less cost-conscious passes may offer fast-track entry or exclusive capacities for their 'must visit' attractions and experiences to entice customers into buying a high value pass that prioritises time and access over money.

Understanding your visitor behaviours and attraction mix, market testing and price testing will allow you to find the right value proposition for you and your visitors. **Further market research is recommended before launching any pass product.**

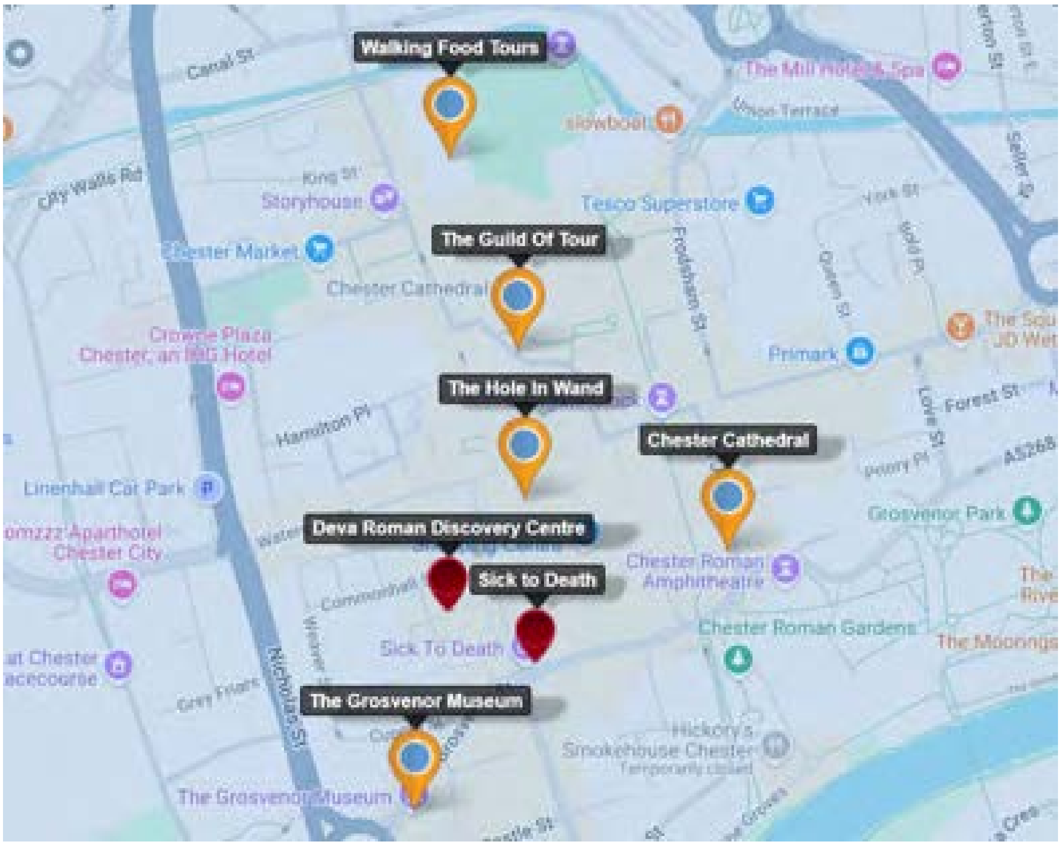
Many software vendors had models for working out a visitor mix and price point, which can be used to produce a first set of prices and marketing strategies. This could be utilised to create a trial pass product and then continued improvements could be used, based on the better data the trial produces, to increase sales and revenue generation in the longer term.

All vendors said that initially reluctant experience providers were usually convinced by the success of others in the same market and once the pass product was up and running it was much easier to approach suppliers to join with up to date data and personalised educational materials.

"When we're looking at a new destination we create working models for our clients, taking into account factors such as attraction rates, market conditions, and revenue targets. It's about demonstrating value and educating attractions on the benefits of broader distribution."

DATA TO SHARE

These attractions and experience providers should be included in your preliminary pricing. Those marked in red said they would not be interested in participating but have been included for completeness.



DATA TO SHARE

Pricing of each attraction is also important when looking at the product overall. These are the prices for the attractions which expressed an interest in joining a destination pass scheme.

Interested Attractions

Attraction	Adult Price	Child Price
Chester Cathedral Tour	£14.00	£10.00
Chester History and Heritage	Free	Free
Chester Zoo	£34.00	£26.00
Grosvenor Museum	Free	Free
Guild of Chester Tour	£10.00	Free
Gulliver's Theme Park Resort	£31.00	£31.00
Ice Cream Farm	£2.50	£2.50
Jodrell Bank	£14.00	£10.00
Lion Salt Works	£7.30	Free
Port Sunlight Village Museum	£8.00	£5.50
Stretton Watermill	£4.10	Free
The Hole in Wand	£8.99	£6.99
Walking Food Tour	£90.00	N/A
Weaver Hall Museum	£4.10	Free

Attractions Not Interested

Attraction	Adult Price	Child Price
Anderton Boatlift Walking the Lift Tour	£10.00	£10.00
Anderton Boatlift River Cruise	£7.00	£6.00
Sick to Death	£8.00	£4.50
Deva Roman Discovery Centre	£8.00	£5.00

PASS NEXT STEPS

OPTION 1

Join an Existing Scheme

Whilst the general response to this consultation may seem positive, even those who have rated themselves as interested have caveats for why they feel reluctant to join something untested. There have been questions about the set up costs, the genuine size of the market, and potential engagement, the geographical area, and there is a large amount of work to do with engaging some major stakeholders, particularly in accommodation and transport sectors.

The amount of resource required to create and manage a new pass product should not be underestimated and being able to work with an existing pass (Visit Manchester) would give you a chance to test the market and collect data without significant start up costs.

Working as a reseller for the Manchester Pass would allow Visit Cheshire to generate revenue from sales with very little investment and begin to collect data to decide if a pass more focused on Cheshire would be viable.

Visit York is a successful destination pass covering a similar geographic area with York providing the anchor destination and areas across Yorkshire benefitting from the visits to the area. The attractions covered by the 'city pass' cover a much wider area than the city itself.

In partnership with Visit Manchester you could attract more Cheshire attractions to join the pass and increase the reach of the pass overall.

OPTION 2

Big Weekend

The Big Weekend is an annual event organised and delivered by DMOs and designed to boost tourism within their respective counties.

The Big Weekend offers residents the opportunity to enter a ballot to win free tickets to a variety of attractions and experiences across the county. This also includes complimentary overnight stays at hotels or bed and breakfasts, and free meal vouchers are also up for grabs.

Primarily the Big Weekend aims to encourage residents to explore the hidden gems and attractions within their own counties. By experiencing first hand the diverse range of offerings, residents become ambassadors for their local tourism industry, sharing their positive experiences with friends, family, and beyond.

Furthermore, these events provide a significant boost to the local economy, and play a vital role in extending the tourism season. By offering enticing incentives during the shoulder seasons, this event encourages visitation beyond the traditional peak summer months. This helps to distribute tourism demand more evenly throughout the year, benefiting businesses and ensuring a more sustainable tourism model.

This would be a good testing ground for the appetite for a visitor pass in uncertain economic times. The platform to deliver the Big Weekend already exists and is tried and tested in other regions, and the onus is on the experience provider to upload their offer. This will also be vital in gathering much needed visitor data for Cheshire. If providers all engage in the process of signing up to offer then this will be valuable information in knowing where their commitment lies in a potential visitor pass scheme.

OPTION 3

Annual Pass - Locals

Many of the pass software vendors who provide platforms for tourist 'city' passes also provide pass products (free or paid) that are aimed more at local and domestic markets than international and long distance, short term visit travellers. They also can provide 'marketplace' options for visitors and/or locals who want to mix and match attractions without a specific pass.

These products tend to have a longer expiry date, usually of around 1 year, with discounted options rather than including a 'free' entry to any of the attractions.

In some cases this pass is solely funded by sale of the pass, and in others it is funded by the experience providers (much like a marketing budget) who pay to be included, with the pass sold at a very low rate to drive membership sign ups and data collection.

This data could then serve to inform a pass aimed at tourists from further afield rather than local visitors, or can be a source of income and data in it's own right.

OPTION 4

City Pass - Tourists

The City Pass option which offers a selection of free (or discounted) attractions over a short period aimed at tourists to the destination is an attractive option.

Whilst this option requires more effort it also brings the opportunity to cover it's own costs and even create a profit, which can be reinvested into the product and the attractions involved.

In discussions with other pass providers using this method, the resource required is front loaded in terms of the overall project needing additional resource to set up the pass, but a lower amount of resource is needed to maintain and grow it once it is in place as the product remains pretty static year on year.

At the moment we do not believe there is enough data on the market for this to be seen as fully viable however there is interest from the attractions, experience providers and vendors willing to work to assess the potential costs.

Other recommendations

- Data for the destination is lacking, and what does exist is inconsistent, hindering comprehensive analysis. Marketing Cheshire could unify data reporting through an annual, standardised approach for the whole region to feed into.
- Further research is also crucial to understand visitor behaviour, consumer trends, and the true economic impact of tourism. Current data, heavily influenced by the wider North West and particularly by Liverpool and Manchester, may not accurately reflect Cheshire's unique tourism landscape.
- To ensure data reliability and inform key decision-making, dedicated visitor research specific to Cheshire is essential. We can recommend suitable partners for this endeavour.
- Collaboration in the tourism industry across Cheshire is poor, with pockets of great work being undertaken by individuals or organisations that aren't working with each other. Marketing Cheshire could improve this and encourage collaborative working, putting structures in place to help facilitate this and foster a more positive and less competitive attitude to collaboration.
- The development of themed products could draw inspiration from the existing Destination Management Plan.

MARKETING DATA

As discussed. as well as the vendor data requests listed on page 68, we also recommend general marketing data collection on visitors to Cheshire to help inform your decision making. This will inform your future communication strategies for whichever product you choose to go ahead with, helping you understand your audiences and how best to target them.

Ideally you would work with a research company to undertake market research with your current visitors and non visitors, looking at the following:

- How people visit and journey around Cheshire
- What drives them to visit/what are their motivations
- What are their barriers to visiting
- How they make their travel decisions
- What visitors think of alternative destinations

You would use this data to create a **visitor segmentation system** to include geographic, demographic, behavioural and psychographic information, as well as awareness benchmarking metrics so you can measure success.

THANK YOU

It has been our pleasure to compile this report and we hope it proves useful as you continue your journey in establishing Cheshire as a tourism destination.

If there is anything else we can do then please do not hesitate to get in touch.

Kind regards

Carly, Drea and Rachel - QLINE Consulting

RESEARCH SOURCES

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www.trustpilot.com/review/www.city-sightseeing.com

WITH THANKS TO

Attractions: Big Heritage, Canal and River Trust, Chester Cathedral, Chester Zoo, Gullivers, Ice Cream Farm, Jodrell Bank, Portsunlight Village, Potions Cauldron Group, West Cheshire Museums

Tours: Guild of Chester Tour Guides, Walking Food Tours UK

Accommodation: Chester Hospitality Association, Glen Garth Guesthouse

Transport: Chester Park & Ride

Chester BID

DMOs: Experience Oxfordshire - Hayley Beer-Gamage, Visit Essex - Lisa Bone, Visit Herts/Visit Kent - Alanna Kite and Steve Law, Visit Manchester - Richard Sherwood

Pass and Trade products

- Bandwango - Mo Parikh
- Experience Henley - Philippa Ratcliffe
- Open Pass - Fabian Goebel
- PM Consulting - Peter Muttitt
- Prioticket - Ramon Vriesel
- Smart Visit - Ryan Rieveley
- Ventrata - Holt Lau

With additional thanks to:

Mike Newman
Travel trade specialist with experience in delivery and selling pass products to the international travel market.
www.b2me.net

Anh Nguyen
Pass Product Developer with Experience Glasgow, involved in the recent product development for Glasgow City Pass.
www.experienceglasgow.com

Geoff Morrison
Founder of Scottish Pass which includes Edinburgh, Glasgow and Stirling City Passes.
www.linkedin.com/in/geoffmorrison2

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