



Shakespeare's England Strategy

Sept 2019 – August 2022

Updated October 2020

Shakespeare's England is the DMO (Destination Management Organisation) for South Warwickshire and the surrounding area, with Stratford-upon-Avon, Warwick, Kenilworth and Royal Leamington Spa being the 4 main towns. It is a public private sector partnership and a not for profit membership organisation. Its aims under its Terms of Agreement are to:

- Undertake marketing activities to attract more domestic and international visitors to the District of Warwick and the District of Stratford-on-Avon and increase the profile of the region
- Encourage visitors to stay longer, explore further and spend more
- Increase awareness and engagement with tourism from the wider population
- Help manage and co-ordinate tourism partners to work together for the benefit of the tourism businesses improving productivity and employment (Skills) in tourism related businesses
- Improve the welcome and experience of visitors to the area in partnership with other tourism businesses and transport providers
- Develop a sustainable and viable model of destination management through an accredited Destination Management Plan (DMP) that is recognised by VisitEngland and VisitBritain and provide advocacy and representation to the Company's tourism partners and act as their representative to VisitEngland and VisitBritain and other public sector partners

Current Position from TEIA Report from the Research Solution

No. of Day Visitors	9,611,000 (91%)	Total spend from Day visitors	£381,699,000 (62%)	Spend per day visitor	£39.71
No. of o/n Visitors	982,000 (9%)	Total spend from o/n visitors	£249,388,000 (38%)	Spend per o/n visitor	£254
Total no. of Visitors	10,593,000	Total Spend	£641,716,800	Combined Spend per visitor	£60.57
		Total spend (including indirect & associated)	£805,356,,800	Combined spend per visitor + indirect & associated	£76.02
Total No. of jobs	14,409	Spend per job creation			£56,000

Vision

To encourage domestic and international visitors to explore further, **stay longer** and spend more

Key Focus

International overnight visitors who make up 1/3 of overall visitation, but contribute 2/3 of Tourism's Economic Impact on the area

Aims & Objectives

1. To make Shakespeare's England the recognised body for the delivery of Tourism across South Warwickshire, by visitors, residents, businesses and public bodies
2. To provide a joined-up Tourism Offer across the Stratford & Warwick Districts
3. To facilitate the provision of Tourism delivery in North Warwickshire
4. To be recognised as an area 'accessible to all'
5. To increase overnight visitors by 5% (+49200)
6. To increase the economic impact of visitor, spend by 10% year on year
7. Target 4% year on year employment growth and continue to out-perform the National average by attracting a skilled workforce and upskilling the local workforce

8. Increase productivity by extending the night-time economy and attracting Business Tourism particularly during the shoulder seasons
9. Improve bus & rail connectivity across the region
10. Deliver against the West Midlands Industrial Strategy and the Sector Deal for Tourism, as an integral part of a Tourism Zone

Governance

The Board of Shakespeare's England is made up of predominantly public sector businesses with representation from the two main local authority partners Stratford District Council and Warwick District Council. Local Authority involvement, as laid out in Terms of Agreement cannot exceed 19.99%. Warwickshire County Council is currently also represented on the SE Board, but should Private sector members drop below 13, they would revert to 'observer' status.

Major Richard Carney, General Manager IXL Events Ltd Dallas Burston Polo Club from Dallas Burston Polo Club, was voted in as Chair by the Shakespeare's England Board on 10th July 2019, with Katie Barrie, Marketing Manager-Midlands & East, English Heritage (Kenilworth Castle), as Deputy Chair. The remaining Board Members organisations and their designated representatives are as follows :-

1. Dallas Burston Polo Club – Major Richard Carney – CHAIR
2. English Heritage (Kenilworth Castle – Katie Barrie- DEPUTY CHAIR
3. Birmingham Airport – Tom Screen *
4. Warwick Castle – Nick Blofeld
5. Royal Shakespeare Company – Kerry Radden
6. Shakespeare Birthplace Trust – Rachael O'Connor-Boyd
7. Bicester Village – Clive Doble
8. Eden Hotel Collection – Tara Robinson
9. Strat>forward – Joe Baconnet - no change
10. Stratford District Council – Cllr Matthew Jennings
11. Warwick District Council – Cllr Richard Hales
12. Chiltern Railways – Sue Gee
13. Avon Boating – Nick Birch
14. Solihull College & University Centre (Stratford College) – Lindsey Stewart
15. Compton Verney – Julie Finch
16. NFU Mutual – Danny James
17. Warwickshire County Council – Cllr Heather Timms

(* I received an email from Tom Screen on 6th October 2020 that BHX needs to temporarily step down from the Shakespeare's England Board whilst they deal with the fall out from the COVID-19 pandemic, but hope to return within 6-18 months)

Target Markets

It is challenging to identify domestic versus international day visitors, as we currently have no touch points that accurately track this data, across Shakespeare's England. We can however gain an insight through the split of domestic versus international overnight visitors, where we can see that although only 1/4 of our overnight visitors are international, they represent just under half of the total spend and per visitor spend 129% more than every domestic guest.

No. of Domestic o/n visitors	726,000 (74%)	Total spend from Domestic o/n visitors	£141,563,000 (57%)	Spend per domestic o/n visitor	£195
No. of International o/n visitors	256,000 (26%)	Total spend from International o/n visitors	£107,825,000 (44%)	Spend per international o/n visitor	£421
Total no. of o/n visitors	982,000	Total Spend	£249,388,000	Combined Spend per visitor	£254

When this strategy was written in September 2019, COVID-19 had not been heard of and there was no reason to believe that International Visitors to the UK would not continue to grow, at that time the target markets were

1. USA
 2. China
 3. India
 4. Europe – France/Germany/Ireland/Poland
 5. Commonwealth Countries – specifically Australia/New Zealand/S. Africa/Canada/Ireland/India/Pakistan
1. The traditional long-haul English-speaking markets are still strong in our area and have a high spend per capita
 2. China is the fastest growing International Market, though from a low base, and has a high per capita spend as well as increasing VFR (Visiting Friends & Family), as a result of the large student populations at Coventry, Warwick & B'ham Universities
 3. Large growth in the VFR market can be seen from India
 4. Visitors from the Irish Republic and France dominate in our region as reported by the IPS (International Passenger Survey) Figures
 5. Commonwealth Games provides a great opportunity to attract international visitors from Commonwealth and sports loving Countries
- These target markets align with Birmingham Airports Strategic Plan, for growth from 15m -18m passengers by 2030. (This also identifies the Middle East, still a weak market for us, but one to keep an eye on.)
 - They are also inline with the recently launched West Midland Tourism Strategy, which identifies China/North USA/Germany/Australia & India as their target markets
 - They encompass the Marketing segmentation of Culture Buffs (China) Sightseers (USA), Buzz Seekers (Germany/India/USA/Germany) and Adventurers (Germany/Australia) which reflects our offering.

Although long term these target International Markets are likely to remain the same, inbound Tourism to the UK is unlikely to return to 2019 levels until 2023/4 and as such we will need to put more focus on Domestic Visitors, however as shown by the information above we will need to more than double the numbers of domestic visitors staying overnight to replace the potential loss in spend.

In August 2020 VisitBritain published the following information taken from the IPS (International Passenger Survey) Q1 Impact Report, regarding their projections on the potential loss in value from International and Domestic Visitors

2019

- 40.9m inbound International visitors
- £28.46bn International visitor spend
- £91.6bn Domestic spend

Projection for 2020 **Pre-COVID** was for International footfall of +2.9% and spend +6.6% which would have given values of 42.1m visitors & £30.3bn spend

As of 12 October 2020, we were looking at

2020 International

- -74% visitors to 10.6m
- -79% spend to £6.1bn a loss of £22bn versus 2019

2020 Domestic

- -49% spend from £91.6bn to £46.8bn, a loss of £45bn versus 2019

Total tourism spend reduction across the country International + Domestic of £67bn

There is no reason to believe this will not be reflected throughout the country

Opportunities

We have 3 unique opportunities coming to our region in the next 3 years, which if capitalised upon, give us the momentum to significantly raise the profile and awareness of the area, both domestically and internationally and give Warwickshire a greater chance of a quicker bounce back

1. Coventry City of Culture 2021
2. Commonwealth Games Birmingham 2022
3. Sector Deal for Tourism incorporating 5 x Tourism Zones

Strategic Goals

1. To promote our regions rich cultural heritage and attractions to maximise the opportunities provided by **Major Events in 2021 & 2022** to significantly Increase numbers of o/n visitors.
2. Lobby for **improved connectivity by bus and rail** from 1 side of the region to the other to support City of Culture (Coventry – Stratford) and Commonwealth Games (BHX – Stratford, Kenilworth, Warwick direct). Potentially to form part of Tourism Zone BID
3. Work with local businesses to **champion** all aspects of **accessibility**
4. Provide a fully **integrated Tourism service** across Stratford & Warwick Districts, including the small Towns and Wards where appropriate and strengthen the link with North Warwickshire Tourism, to deliver TIC Services, Event Management and product development
5. Become **THE** Recognised Body for Tourism Delivery across South Warwickshire by effective communication of the importance of the sector to local business and populous and delivering against the 5 DMP Pillars.

6. Be a core element of a national **Tourism Zone** by identifying and partnering with the key regional stakeholders and through direction from the **Sector Deal for Tourism**
7. Reduce seasonality by **attracting MICE Business** into shoulder seasons working with regional neighbours where beneficial
8. Extend the Evening Economy by supporting **Purple Flag accreditation** in Leamington Spa, Stratford, Kenilworth & Warwick and encouraging the same in Rugby, Nuneaton and Bedworth
9. Encourage greater cooperation between tourism businesses through the **development of SE products** including Stay Play Explore Warwickshire, The Explorer Pass by Shakespeare's England and Cultural & Special Interest trails across the region and emphasise the relationship between Tourism and Retail.
10. Capitalise on the **DEF Projects** – England's Originals, England's Waterways, England's Literary Greats

Strategic Ambitions

- Be a leading advocate for the sector to influence investment from stakeholders, to drive job creation, skills development and sustain the DMO
- Operate as an umbrella organisation coordinating all aspects of the Tourism provision across the region, both South & North Warwickshire, working alongside and in partnership with the BIDs, through which the local authorities can operate Visitor Information Services and deliver local Events
- Grow the private sector membership by nurturing new members through from 'free listing' to fully paid up members to address the public: private investment ratio
- Continue to develop the public sector relationship to secure long term investment and sustainability
- Enhance communication to residents of the benefits and economic impact provided by a strong local visitor economy
- Promote our rich cultural heritage & attractions to local residents through support of English Tourism Week & Heritage Open Days
- Drive a night-time economy that supports visitors and residents equally. Supporting our High Streets and making Warwickshire's USP its 'Welcome for All'.

Delivering for our Members

- Their 'voice' at the CWLEP Board, through the CE Helen Peters, to champion Cultural and Tourism issues and identify potential funding
- The representative DMO on the West Midlands Tourism Board, Helen Peters Board Member
- Maintain and develop the SE website, social media platforms, print collateral and Trade Show presence to promote our Members
- Engage with Travel Trade & Travel Press to deliver Familiarisation visits to the area
- Provide business support, deliver insights on current affairs and statistical analysis for the sector

- Be the representative for South Warwickshire domestically & internationally with VisitBritain/VisitEngland, Travel Trade Consortia and Press
- Lobby on members' behalf to maintain local authority and business support for the DMO
- Pursue additional funding opportunities that could benefit members
- Deliver Networking opportunities, Training Workshops and Industry Updates, via our Tourism Forums, CW Business Festival, VB/VE engagement, BID engagement
- Continue to support the development of new trade ready product that features members and act as a distribution point
- Collaborate with our regional neighbours where it adds significant value to our message and the potential ROI