

## Appendix 1. Shakespeare's England Conditions of Grant update as at March 2023

| Condition  | Progress   | Rag Rating   |
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| 1. Retain the 3 existing Membership categories and add a Free-listing, which will literally be a listing not a membership and will not include an image.   | The Free listing facility is now available on the current website and is a key element of the brief given to our new website providers. We are currently in discussions with SDC and WDC around the logistics of sending a communication to relevant businesses.     | <b>AMBER</b> |
| 2. By 31 August 2024 to show an increase in total memberships, targeting Bronze x 80, Silver x 50, Gold x 14, free listings x 100 across Shakespeare's England. (SDC & WDC to introduce SE to the hospitality & leisure business rates payers to achieve this).          | As at 25 Jan 2023 the position is Bronze 45/80 = 56%. Silver 34/50 = 68%. Gold 9/14 = 64%. We also have 6 stand-alone Meet Members, who do not receive this status as part of their Gold membership but have elected to take a Business Membership.                  | <b>AMBER</b> |
| 3. Full review of the Shakespeare's England website, by an independent body within 12 months, and an automated registration system for free listings within 6 months of the start of the 2-year period i.e. by 28 February 2023.   | Independent review will be carried out in August 2023.<br><br>The new website, including the process for adding free listings, and allowing members to update existing listings, has a target go-live date w/c 3 April 2023.   | <b>AMBER</b> |
| 4. New metrics dashboard including website engagement to form part of quarterly report (CEO Board Report) and annual O&S Committee Reports for both SDC and WDC.   | In place and already being used.   | <b>GREEN</b> |
| 5. Publication within 3 months from 1st September 2022, of a two-year business plan setting out:<br>· the main activities and campaigns Shakespeare's England will undertake over the 2-year funding period and how these will fulfil the aims and objectives of the DMO | The 2 Year Business Plan was circulated to the SE Board 29th November. It is also an agenda item for Board Discussion 25 Jan 2023. The business Plan has been circulated to the current Portfolio Holder for Economy and Culture as well as relevant Officers at WDC | <b>GREEN</b> |

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| <p>6. Promotion of South Warwickshire as a Green Tourism destination to align with the declarations of climate change.</p>  | <p>An initial Sustainability and de-carbonisation survey sent to SE Members w/c 16 Jan 2023, to start the process of tracking where SE Members sit on the Global Destination Sustainability Index (GDS). Running in parallel to this a post grad student has been commissioned to carry out a de-carbonisation mapping exercise for our key sectors, which will help inform the GDS Index work.</p>   | <p><b>AMBER</b></p> |
| <p>7. Engagement across social media channels to be monitored and reported upon quarterly via the new metrics report (dashboard), targeting an increase of 60% in click throughs to the Shakespeare's England website by the end of the funding period (31 Aug 2024).</p>   | <p>Metrics are being monitored and reported on to the SE Board within the new dashboard. We have not yet seen a significant increase in click throughs to the website, but have plans in place to address this, which will be assisted with the launch of the new website.</p>  | <p><b>AMBER</b></p> |
| <p>8. Success to be benchmarked against published VisitBritain (VB) figures showing % growth /decline, in visitor numbers, visitor spend and tourism related employment.</p> <p>(NB there is a 12month+ lag in all data. SE will report on 2021 results by 31 December 2022, 2022 results by 31 December 2023. 2023 results will not be available until after end of the grant period).</p> | <p>Tourism Economic Impact Assessment Report for 2021 now received. A comparison of this against VB results was shared with the Board in early September. SE and VB were both at -78% in 2020 v 2019.</p> <p>SE was at -82% against 2019 in 2021, VB were at -80%.</p> <p>Recovery of International markets is way behind that of domestic.</p> <p>Shakespeare's England's International visitor spend in 2019 was £107,826m, we would need this to reach £112,139m, an increase of £4,313m in 2023 to be in line with the VB forecast.</p> | <p><b>RED</b></p>   |
| <p>9. SE to exceed VB/VE published Return on Investment (ROI) which is currently for every £1 of central government funding they return £25 in economic benefit to the UK from tourism spend, to be measured the same way, comparing SDC/WDC grant funding versus value of tourism</p>  | <p>SE ROI in 2021, economic value of Tourism versus investment from local authority funding is £1:£2,948.</p> <p>VB/VE ROI yet to be released</p>   | <p><b>GREEN</b></p> |

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| across Shakespeare's England as reported in the Economic Impact Assessment Report   |  |              |
| 10. Target to reach/surpass pre pandemic (2019) visitor numbers and spend by end of funding period ie 10.6+million visitors £805m spend.  | At year end 2021<br>Volume = 7.8m -26% versus 2019 but + 39% v 2020<br>Value = £516m - 35% v 2019 but + 53% v 2020   | <b>AMBER</b> |
| 11. Host quarterly Tourism Forums (face-to-face or virtual) at locations spread across the geography of South Warwickshire and a minimum of 2 subject specific webinars eg Customer service, Accessibility, maximising impact of social media, use of google analytics. | January 2023 forum took place at the Charlecote Pheasant Hotel (Stratford District) and April 2023 at Mallory Court (Warwick District). We are targeting Billesley Manor (Stratford District) for July 2023.   | <b>GREEN</b> |
| 12. Evidence of targeted marketing and promotion re business tourism e.g, sports tourism, Commonwealth Games legacy, conferences, trade shows.  | Working closely with WMGC we co-hosted four familiarisation trips to SE for India, Canada, and Australian travel trade media and agents. Engaging with a variety of members and resulting in articles in international publications. The SE team provided staffing support and collateral during the CWG at Leamington and Warwick Festival Sites, working closely with WDC and Bowls England. We also delivered digital support regarding local events and the month-long WDC CultureFest via blog content, event listings, email and social media. SE embraced the Football World Cup using Alfie the alpaca from Fairy Tale Farm as our 'mystic Meg', this received far reaching publicity across local and National media as well as TV coverage.<br>Since October's Board Meeting, SE has had a stand at the CHS Show in Birmingham with Vintage Trains and Charlecote Pheasant, taken a pod on the UKinbound stand at World Travel Market (WTM) with No Ordinary Hospitality Management (NOHM) | <b>GREEN</b> |

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|   | <p>and Shakespeare Birthplace Trust (SBT), and been part of VisitBritain’s Meet the Media event in Paris.</p>   |                     |
| <p>13. Evidence as to how Shakespeare’s England will encourage visitors to travel using climate friendly modes and encourage businesses to reduce their carbon footprint.</p> | <p>Please see 6 above. In addition SE participated in WDC’s Tourism Transport De-carbonisation roundtable and is working with Emma Gibbens (Place Making Projects Manager-RSC) who has been employed to look at the ‘Next Steps for Transport’, with one of the programmes they are keen to introduce to the area being YouSmartThing. SE were able to sign post Emma to the UKSPF Fund and she managed to submit a claim within the SDC BID.</p> | <p><b>GREEN</b></p> |