

Shakespeare's ENGLAND

Warwickshire

Warwick District Council Overview & Scrutiny Committee Report 5th March 2019

The following is a review of activity that Shakespeare's England has undertaken on behalf of the public and non-public sector stakeholders, since the last presentation to the WDC Overview and Scrutiny Committee in March 2017.

Jo Lloyd advised the Board of Shakespeare's England at the October 2018 Board Meeting that she wished to step down as Chair, as she would be leaving Birmingham Airport 1st September 2019 and asked Boar Members to provide her with expressions of interest to take over the role in time for the January 2019 Board Meeting. On 23rd January 2019 Philippa Rawlinson (SBT) was unanimously voted in as the new Chair. The Deputy Chairmanship was held by Warwick Castle with Michael Holland their Director of Marketing being the incumbent, however Michael has now left the Castle so that position is currently open.

Dave Webb, Executive Director of Stratford District Council and officer responsible for Shakespeare's England, retired in December 2018, his position with Shakespeare's England has been taken up by the new Executive Director of SDC Isabel Edgar Briancon.

Nancy Singleton, SDC, who had been Shakespeare's England's Company Secretary since 2012 also retired in December 2018. Warwick District Council has been approached to see if there is a WDC Officer who could take over this responsibility, a final decision and identification of an appropriate officer is yet to be made, so we are currently without a Company Secretary.

Kate Varvedo, Marketing and Communications Manager left Shakespeare's England in June 2018 and has been replaced by Ekaterina Leret, who joined the Destination Management Organisation, in August. The role has been redefined as Marketing & Commercial Manager.

We also have a new Marketing and Administrative Coordinator, Anneka Nicholls, who replaced Dan Campbell in March 2018.

Key Data

WARWICK DISTRICT	2016	2017	+/- %
No. of Trips	3,589,000	3,825,000	+ 6.6%
Spend	£217,127,000	£225,955,000	+ 3.8%
Value to Economy	£271,709,000	£282,661	+ 4%
No. of Jobs	4,638	4,822	+ 4%
% of local employment	6%	6.3%	+ 5%

To put this in context against Shakespeare's England as a region

SHAKESPEARE'S ENGLAND	2016	2017	+/- %
No. of Trips	9,341,000	9,966,000	+6.7%
Spend	£530,722,000	£552,296,000	+4%
Value to Economy	£664,219,000	£690,976,000	+4%
No. of Jobs	11,848	12,322	+4%
% of local employment	8.8%	9.2%	+4.5%

Breakdown by key Market Town

2017	WARWICK	LEAMINGTON SPA	KENILWORTH
Total No. of trips	1,889,559	1,019,000	449,000
Total Economic impact (£)	£130,883,000	£80,384,000	£37,239,000
Total Value per visitor (£)	£69.00	£79.00	£83.00
Day Trips	1,754,559	892,000	387,000
Day trips economic impact (£)	£71,516,833	£30,121,000	£13,080,000
Value per day trip visitor (£)	£41.00	£34.00	£34.00
Overnight trips	135,000	127,000	62,000
Overnight economic impact (£)	£33,829,000	£27,512,000	£14,005,000
Value per overnight visitor (£)	£250	£217	£225

In 2016 WDC invested £75k into Shakespeare's England, 0.027% of the £271,709 million economic impact Tourism has on the local economy. This means that for every £1 invested, there was an ROI of £362, or 1:362.

In 2017 WDC again invested £75k in Shakespeare's England, 0.016% of the £282,661 million economic impact Tourism has on the local economy. This means that for every £1 invested there was an ROI OF £377, or 1:377.

In 2016 the combined public sector bodies invested £175k in Shakespeare's England, which was 0.026% of the £664,219 million economic impact Tourism had on the region. Meaning that for every £1 invested there was an ROI of £379, OR 1:379

In 2017 the combined public sector bodies invested £175k in Shakespeare's England, which was 0.025% of the £690,975 million economic impact Tourism had on the region. Meaning that for every £1 invested there was an ROI of £394 or 1:394

Visit Britain records a National return of just £25 for every £1 invested by central government, so we are far exceeding the National picture.

The VisitEngland figures for the West Midlands region in 2017 indicated a decrease in trips to the area by -11% and a decrease in value to the West Midlands economy of -9%, so the Warwickshire district is bucking the trend, as a result of its investment and supporting for tourism into the area.

Grant Period 2016-2019

	2016	2019	+/- %
Income	£267,752	£275,500 (estimated)	+ 2.3%
Public Sector Funding	£175,000	£155,000	- 11%
Non Public Sector	£89,000	£120,500	+35%

Funding			
Members	107	139	+ 30%
% Public v No Public Funding	67:33	56:44	
SDC Members	47%	54%	+15%
WDC Members	31%	20%	- 35%
Other Members	22%	26%	+18%
Meet (Business Travel) Members	12	16	+33%
SDC Meet Members	3	9	+200%
WDC Meet Members	4	3	-25%
Other Meet Members	5	4	-20%
Face Book followers	25,000	23,000	- 8%
Twitter followers	5,000	6,400	+28%
Instagram followers	NA	1,258	
Pinterest	NA	9 boards. 60 pins	

Activity since March 2018 (last OS Report)

Shakespeare's England has been involved in a vast array of activity over the last year to promote our region, as a Leisure and Business Tourism destination. We have also been recognised by VisitEngland as an exemplar amongst the 320 plus DMO's operating in the UK.

Confex – Business Tourism Trade Show. Ardencote, TOP, Warwick Conferences, Ragley Hall (the Earl dropped by) Johnsons Coaches & Ettington Chase, were the stand partners. Stand reception with Conference Coventry and Warwickshire. 117 contacts obtained.

ExploreGB – annual VisitBritain hosted international leisure buyers' event and familiarisation visit for Chinese, Japanese, and US buyers.

ITB - annual Travel Trade Show for Germany in Berlin. SE joined West Midlands Growth Company (WMGC) to promote the England's Waterways project, as Germany is the key target market.

Bicester Village UAE Workshop meetings with 15 hosted buyers. Travel is all about shopping for this source market. Potentially strong for Leamington Spa

Rugby Borough Council Tourism Partnership Meeting – presentation from SE on the benefits of having a DMO and DMP.

RAF Lakenheath - consumer facing show attracting 1300+ serving USAF personnel and families looking for places to visit during their 3-year tour in the UK.

MeetGB + Familiarisation Visits – annual VisitBritain hosted international business buyers' event and familiarisation visit. Hosted a group from Germany, France, USA and Canada, visiting Hill Close Gardens, Warwick Racecourse & Castle, and Warwick Conferences.

Shakespeare's Birthday Celebrations – SE is a stakeholder on the organising committee as with **London B&B, Germany – fam-visit to the region as a result of a meeting at ITB** following the successful Sales Mission to Frankfurt in December 2017 promoting Warwickshire through England's Waterways DEF project.

Golden Keys Round Table – 50 1-2-1 meeting with London hotel concierges encouraging them to send visitors to Warwick and Leamington from Marylebone and to use the Explorer Pass

Ministerial Visit Michael Ellis MP – The Tourism Minister came to Birmingham and met with stakeholders to learn about the England's Waterways DEF project. We lobbied him on the Sector Deal for Tourism.

Guy of Warwick Festival – The 2nd Warwick Festival concentrating on the Legend of Guy of Warwick. SE Chaired the Warwick Attractions Group made up of Lord Leycester, Warwick Castle, Market Hall Museum, Warwick School, St Mary's Church, Warwick VIC and the Racecourse. Overall the weekend was a success, but funding is needed if we are to repeat and grow.

VisitEngland Destination Management Plan Visit - SE facilitated a meeting between Andrew Stokes, Director of England and Philippa Rawlinson, Chair of the Destination Management Plan, for an update

on the DMP development since 2015. Successful visit and SE was commended on its DMP and as a DMO.

PR Food & Drink Fam Trip – 2-day hosted visit for 5 Press

The Meeting Show – Business Tourism Trade Show partnering with Ricoh Arena, Johnsons Coaches, Chesford Grange, Billesley Manor and Stratford Park Hotel.

ExploreGB 2019 Site Visit – SE Bid to host ExploreGB in 2019 at NAEC Stoneleigh. Unfortunately, we were unsuccessful. VB's main concern was the lack of 'wow' on arrival. Did not feel it was impressive enough for International delegates

Group Travel & Leisure Show – Domestic, Group Travel Trade Show, stand partners SBT / Q Hotels, Stratford Park, Hathaway Tea Rooms.

VIBE (VisitBritain Business Exchange) - Incorporates VisitBritain's Annual Review and 1-2-1 Meetings with their Country Managers as well as insight briefs from the main source Markets, Americas, China, GCC.

World Travel Market – Largest Travel Trade event in UK, 51,000 domestic & international visitors from 38 sectors of the industry. In 2018 WTM resulted in a million meetings and £3 billion of contracts for the Tourism Industry. SE had a double presence, in 2018 a Shakespeare's England pod stand, and organised the England Originals DEF Project stand.

Midlands Engine Meeting - SE CE is a Member of the Midlands Engine Tourism Group along with representatives from Marketing Nottingham, WMGC, Visit Solihull, Visit Lincoln, Visit Leicester, BHX and East Mids. airport. The Group is chaired by Peak District & Derbyshire. Tourism is the 3rd largest sector in the midlands economy, providing £8.7bn, supporting 394,000 jobs, 20% of all those created in last 5 years, but faces major challenges from a lack of investment and as such is in danger of not reaching its full potential for the Midlands Engine. WMGC estimate an investment of **£10m** in tourism marketing will generate additional expenditure in the Midlands of **£200m**, creating **4,000** new jobs. The group's aims are as per most individual DMOs, increasing staying visitors, increasing business tourism and attracting investment.

CW Chamber Business Festival – during the Festival SE held a **Warwick Members Recruitment Evening** – at **The Court House, Warwick**, aimed at networking with existing Members and targeting potential new members in Warwick. Despite great support from Warwick TIC and Market Hall Museum, the turn-out was poor. Lessons learnt for the events in Kenilworth and Leamington later in the year.

VisitEngland's annual DMOs conference that was attended by CE and Marketing & Commercial Manager delivering workshops on Improving Productivity, (extending the season), VB Commercial Update and Tourism Trends, VE activity, Research & Insights, Business Hub, working with Airbnb Experiences, the Inbound Tourism Toolkit, Quality Assurance Assessments, and engaging with English Tourism Week. It is also a great networking event and platform for sharing and learning best practise tips from other DMOs

Parliament Day – delighted to be joined by WDC (Martin O'Neill), Kenilworth Castle (Tom Jones), Kenilworth Town Council (Maggie Field & Cllr Marilyn Bates) and WCC (Alex Holmes), Open Pass (Andrew Twigg), Bicester Village (Abbi Griffiths), Strat>forward (Joe Baconnet), RSC (Tim Cooke). Opportunity to meet with Secretary of State Jeremy Wright, Nadhim Zahawi and Matt Western to discuss the Sector deal for Tourism.

Excursions – Domestic Group Leisure Show organised by Tourism South East. Stand partners SBT/RSC, Shakespeare's Schoolroom and Shakespeare Distillery, promoting their new Gin Cruise with Avon Boating, and Gin School + Distillery Experience

Meet SE Fam Trip & Business Exchange – 20 PAs, Agents and Corporates on an o/n visit to the area. 14 Members exhibited at the Table Top Exchange, site visits at Ricoh Arena, Dallas Burston, and Warwick Castle and Lovely Pubs

Attended - **English Tourism Week Conference**

Warwick Town's Conference

Discover England Fund Conference

England Destinations Forum

Upcoming Activity

During the remainder of Shakespeare's England's trading period which runs until 31 August 2019 we will be promoting Warwick District at

- **UKInbound Convention** leisure tourism

- **Confex** business tourism
- **RAF Lakenheath Family Day.** leisure tourism
- **ITB, Berlin** leisure tourism
- **MeetGB Convention & Fam Visit** business tourism
- **ExploreGB Convention & Fam Visit** leisure tourism
- **The Meeting Show** business tourism

CW Chamber Expo – 15 March, the

A decision is yet to be made on this Chamber Event. We attended in September and had good interaction with fellow stand owners, securing Silver Membership from Escape Live, but were disappointed in the Visitor numbers and profile, but have been advised the March event is better attended.

England Originals DEF Project Training & Welcome – 21 March, TOP (The Other Place)

The aim of this event is to launch the England Original's DEF project to Shakespeare's England's Members and potential Members, to show what the project has delivered over the last 3 years and how they can interact with it moving forward. Similar activities are taking place for **England's Waterways** and **Experience England** DEF projects. Being part of these projects has given Shakespeare's England the benefit of

English Tourism Week 30 March – 7 April – This VisitEngland led annual event hails the beginning of the Visitor Season. It is specifically aimed at Domestic visitors and specifically local footfall, reminding people what is literally on the doorstep. We will be working with WDC and Advent Communications to promote Member activity and competitions throughout this period

Pub in the Park – 5-7 July. Shakespeare's England have had initial meetings with the organisers of Pub in the Park, which this year will have a venue in St Nicholas Park, Warwick and have checked that they have approached key local SE Members like The Cross, Purity, Shakespeare Distillery, Cotswold Distillery to ensure they are involved. We will be supporting the event and encouraging accommodation providers to bundle this up into packages to include the Stratford River Festival which takes place the same weekend.

Art in the Park Festival – 3rd & 4th August. Shakespeare's England are in discussions with the organisers to see how we can support this event to broaden the awareness particularly to domestic tourists but also within the region by interacting with other SE Members

Sector Deal for Tourism

One of the most important announcements at the end of 2018 was confirmation that the government had confirmed it was taking the Sector Deal for Tourism to the next stage. Sector Deals are a partnership between the UK Government and an industry on its plans for the future and how it can work together to secure long-term strategic outcomes. A Sector Deal is the Government's method of finding its 'winners' and backing them.

A 1% boost in productivity would mean £12bn extra to the economy by 2025.

The UK as the fastest growing destination in Western Europe by 2025.

Skills uplift resulting in 70,000 additional jobs, resulting in 3.8m jobs linked to tourism by 2025.

A roll-out of Tourism Zones, making British destinations the most competitive in Europe

This is vitally important for the Tourism Industry as being granted a sector deal would put us on the same level in the eyes of the government as industries like, automotive, Digital & technology, manufacturing and nuclear.

“Recognising the tourism industry as one of the UK's most successful exports, the Secretary of State for Digital, Culture, Media and Sport, Jeremy Wright has called upon the industry to respond with a renewed commitment to promote its offer throughout the year, not just in the peak summer months, and increase clear career paths. To attract more domestic and overseas visitors and help drive major economic growth.

Securing this deal will be a game-changer for the industry, spelling a step-change in how we underpin the success of tourism for a generation, fixing issues from skills and productivity to extending the season year-round and building stronger tourism destinations up and down the country. And it will be a game-changer for the economy, with a sector deal growing the value of the industry and increasing employment in tourism.

The bid for a sector deal was a result of the tourism industry coming together with one voice during the last 18 months, getting behind the bid with its own ideas for the future and working in partnership.” VisitBritain VisitEngland announcement 27 November 2018

Anthony Pickles head of Tourism Affairs at VB presented at the SE Tourism Forum 23rd January and left us with 3 specific asks that we need to feed back on by 1 March in order for him to use as back up information when they submit the final Bid to government 29 March.

1. What can your business do to support the recruitment and skills campaign? Are you able to make pledges around investing in the skills of your workforce? If you don't currently provide apprenticeships, can you commit to do so in future?
2. If your business collects high level data, can you commit to sharing that with our National Tourist Bodies to help them better target their marketing activity?
3. If your business is not fully accessible, what steps could you commit to - as part of a cross-Industry effort - to make it so

Shakespeare's England have agreed to collate this information, with the help of WCC and respond with 1 voice.

Coventry & Warwickshire LEP

One of the key elements of the Sector deal is the promotion of **Tourism Zones**: a new idea which would help bring together locations of real success, and areas that need more intervention. They concentrate on strong local leadership with LEPs, building product, extending the shoulder season, and fixing local transport issues with planning laws reflecting strong tourism economies. The relationship with the CW LEP has over the last 3 years been challenging as there was no real Tourism lead and they have gone through several changes in Tourism Representation on the CWLEP Board. Helen Peters the CE of Shakespeare's England is currently in talks with the CWLEP Board with a view of taking up that NED position, to ensure maximum recognition and support of Tourism in Coventry & Warwickshire by the CW LEP . This may have been decided by the time the OS Committee meets.

Discover England Funds (DEF Projects)

Shakespeare's England is an active participant in 4 projects
 England Originals (formerly The Collection)
 England's Waterways (formerly Great British Boating)
 Experience England
 England's Literary Greats

When combined this has given us access to projects supported by nearly £2m of central government funding, which has been spent in developing bookable product around these initiatives. The projects

are due to end April 2019 when full disclosure of outcomes will be collated and published and can be reported at the next WDC OS meeting.

Central Government have indicated that as a result of the success of the Discover England Fund projects, some extension funding may be granted up to Sept 2019. England Originals have applied for an additional £150k. The Government's intention is to announce a new funding stream for DEF 11 in 2020.

Digital Marketing Summary

Shakespeare's England Website

- Transferred from Smile to Areca in July 2018
- Some functionality still needs resolving. The Members upload facility and the E-commerce areas of the website not functioning as required. This is currently being worked on
- Next step is to improve the user experience to encourage longer dwell times and the booking of products, via our own fully functioning E-commerce site
- Membership directory build
- Website data capture forms secured to prevent spam / doubling up
- Working on e-commerce area
- Anneka Nicholls (Marketing & Administrative Co-ordinator) spends 1 day a fortnight with the developers
- Working with Net Visibility to improve website traffic and SEO positioning

Social media:

- New content approach
- Increased number of posts including re-posts
- Engagement with the audience (competition, polls, rotation of clickable profile links, stories)

Instagram – 1,258 followers increased by 7 % for the last quarter

Facebook – 22,548 people are shifting from FB to Instagram and Pinterest

NEW SE Members FB closed user group – created in October 2018. 51 participants, more than 40 posts with members' news, special offers, & information requests. Annual Target 100 participants or 66% of Membership

Twitter 6,390 followers - + 0.5 % Twitter (Business) 585 followers 0%

NEW Pinterest – launched Jan 2019. 9 boards created with over 60 pins.

LinkedIn (Meet) 1,210 connections + 4.3%

LinkedIn company page 302 followers 0%

SE solus emails and e-newsletters: Average 8 solus emails a quarter and 2 E-newsletters. This quarter specific WDC solus emails have been sent out on behalf of The Cross, Kenilworth; SE's Members Recruitment Event and Warwick Castle

PR Activity

Shakespeare's England and Advent Communications

Work to be undertaken:

- Promotion of the area as a place to visit – national press/broadcast
- Highlight events in the region – local/regional and national
- Promotion of individual assets as appropriate to fit national features (ie hotels/days out)
- Promotion of SE as an industry voice – identify column, feature and speaking opportunities
- Ensure greater linkage between SE and other key organisations regionally and nationally to leverage further impact
- To ensure that information and messaging dovetails with the Destination Management Plan

Approach/method

- Monthly meetings
- Media releases

- Blogs
- Active selling of forward features
- Copywriting
- Can undertake social media if not done internally

Advent advantage

- Strong links with the local, regional and national media.
- Champions work has seen features on Shipston in the Sunday Times, Leamington Spa in the Daily Telegraph and Warwickshire in the Sunday Times,
- An expert in the meeting and incentive travel market - string of coverage in M&IT, C&IT, Exhibition News, Conference News, Standout Magazine, Event Industry News as well as national and local titles.
- We have worked for many years in hotel and leisure, and food and drink operating for – among others – Macdonald Hotels, Louvre/Campanile and Coombe Abbey – across consumer and trade media
- Strong links with strategically important organisations – Advent PRs the CWLEP, CW Chamber, CW Champions, Coventry 2021 and the CW Growth Hub
- **Budget of £1,000 per month.**

Meet Shakespeare's England

- Our Business Tourism branding has been operating for 18 months
- We have 16 *Meet* Members with a target of 20 by end of 2018/19
- The aim is to specifically drive Business Tourism into the area through attendance at Trade Show, hosting Familiarisation visits to the area and promoting Shakespeare's England as the perfect place to host MICE activities.
- We need to heighten the awareness of our region so that we can compete against the likes of Manchester and York, who have a massive presence at the Trade Shows
- Shakespeare's England is therefore doing a stand share with Conference Coventry & Warwickshire at Confex 2019 and joining forces with West Midlands Growth Company and Conf C&W at The Meeting Show.
- The Meeting Show will be the first time we have a major Destination Stand for the region as a result of this co-operation and with financial funding support from both the CW LEP and GB&S LEP
- This is vital if we are to maximise the Business and Leisure opportunities coming to the area on the back of Coventry City of Culture 2021 and Birmingham Commonwealth Games 2022
- SE is also a stakeholder in the Warwickshire County Council Accommodation study, to assess the current stock, see how this will stand up against the demands of 2021 and 2022 and what will be needed over the next 20 years

Destination Management Plan

- Under the Chairman ship of Philippa Rawlinson, the DMP we fully updated and re published in 2018.
- The 7 key priorities from 2015 have been consolidated to 5, with each priority being led by a designated Shakespeare's England Members, generally taken from the SE Board
 - i. Evidence base & market intelligence – **RSC/WDC ***
 - ii. Destination(infrastructure)development- **SDC**
 - iii. Soft Product Development – **SE/SBT**
 - iv. Communication and profile – **WC ***
 - v. Skills & Careers – **Q Hotels/WCC**
- Since publication Kerry Radon from the RSC has resigned her joint lead, so the responsibility for Research & Intelligence sits 100% with WDC and Michael Holland is no longer at Warwick Castle, leaving the Communication & Profile lead vacant

Shakespeare's England's 2018/19 Objectives

- I. Membership target 150, with a 40:30:30 split Bronze : Silver : Gold/Strategic.
- II. Attract 3rd party funding from 2 indirect tourism sources
- III. Delivery of E Commerce income above budget
- IV. Achieve 20% increase across all Digital channels
- V. Deliver revenue from MEET SE commissions, generated via Conference Desk

1. Membership target 150. 40:30:30 split Bronze: Silver: Gold/Strategic

Year End 2017/18 there were 151 Shakespeare's England Members. 13 resigned from 1 st September, almost the same as last year and a few we are still negotiating with. 12 new members have joined between Sept - Jan	As at 14 Jan 2018
Bronze 46%, Silver 30%, Gold/Strategic 24%	As at 14 January 2019
We aim for 20 <i>Meet</i> Shakespeare's England Members. We currently have 16.	As at 14 January 2019

2. Attract 3rd party funding from 2 indirect tourism sources

This is still very much in progress. The loss of Ollie Nicholls at the CWLEP has put things back a step. A situation we hope will soon be resolved	Target delivery 31 August 2019
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3. Delivery of E Commerce income above budget

There are 3 E Commerce revenue streams set for 2018/19	As at 14 Jan 2019
General E Commerce = £ 2,500	Gen. E Commerce = £ 0.00
Stay Play Explore = £ 2,000	Stay Play Explore = £ 535.27
Explorer Pass = £10,000	Explorer Pass = £ 0.00
	Total = £535.27 = 4%
Total - £14,500	To be exceeded by 31 Aug 2019

4. Achieve 20% increase across all Digital channels

Full details of this KPI still under discussion, following feedback from RSC representative	Ongoing
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5. Deliver revenue from MEET SE commissions via Conference Desk

The Service Level Agreement has now been finalised with Conference Coventry & Warwickshire and we have sourced a separate mobile phone and telephone number which will be operated by Conf Cov & Warks and answered as	Fully operational by 1st February 2019
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‘Shakespeare’s England Conference Desk’. SE will receive 3% commission from any MICE business booked through the Desk	
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