Shakespeare's ENGLAND

A DESTINATION MANAGEMENT PLAN FOR

SHAKESPEARE'S ENGLAND REGION

2015 – 2025

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INTRODUCTION

Foreword

EXECUTIVE SUMMARY

Introducing the concept of the Destination Management Plan

A Destination Management Plan (DMP) is the shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources.

VisitEngland sees the development of Destination Management Plans (DMP) throughout England as an essential tool for delivery of a successful visitor economy – equally, National Government policy encourages destination organisations to become focused and efficient bodies – DMPs are one mechanism to achieve this. A structured plan will focus effort, reduce duplication and maximise investment in the right areas, bringing independent and individual partners together to benefit and develop the visitor economy.

VisitEngland outlines that Destination Management is the process of influencing and co-ordinating the management of all aspects of a destination which contribute to a visitor's experience and is customer focused, taking account of the needs of visitors, local residents, businesses and the environment.

What this means for Shakespeare's England Region

Tourism is one of the key drivers of economic growth to the South Warwickshire economy and surrounding areas. It generates a total business turnover to the area of £547 million annually and supports 9,588 jobs. Across the whole county it generates a total business turnover of just under £1 billion to the local economy which supports 20,800 jobs and 3610 firms (2011).

With so many individuals, SMEs, public and private sector bodies involved in some aspect of tourism across the area including the marketing, management and development of the area's visitor economy it is important that there is a focused plan with clear priorities. This

Destination Management Plan (DMP), will focus effort, reduce duplication and maximise investment in the right areas, bringing independent and individual partners together to benefit and develop the visitor economy. A destination management plan is a shared statement of intent to manage and develop the tourism to the region over the next 10 years, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources. Its specific focus is around the south of the county but also includes the important tourism businesses in the surrounding areas too.

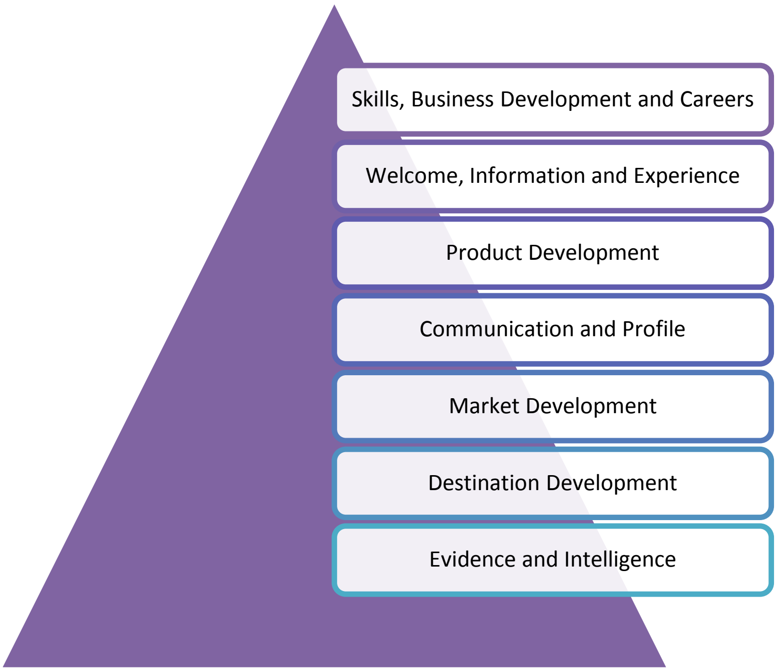
Although Shakespeare's England's board has taken the lead on this plan and have worked with a range of stakeholders, individuals, businesses and business groups to assess the opportunities which face the destination in its development and the barriers which may be faced. This is not a plan for the Destination Management Organisation (DMO) it is a plan for the whole area to bring together skills and resources to the benefit of all.

This plan has the backing and support of key strategic partners across the region including: **Royal Shakespeare Company, Shakespeare Birthplace Trust, Birmingham Airport, Bicester Village, Warwick Castle, English Heritage, Shakespeare's England DMO membership, Eden Hotel Group, Warwick District Council, Stratford-on-Avon District Council, Warwickshire County Council, Coventry and Warwickshire Local Enterprise Partnership (CWLEP).**

The priorities for action which have emerged from this plan will capitalise on those opportunities, provide solutions to any barriers and are supported across the region by the DMO - Shakespeare's England, the industry and private and public partners alike.

Each of the priorities set the scene for implementation across the destination management plan. These can be undertaken in tandem and although some rely on the delivery of other priorities, much can be started as soon as possible. However, it is important that these priorities are connected, and not delivered in isolation as there is a clear connection between each one in their implementation.

Outline of priorities for action for Shakespeare's England region:



PRIORITY ONE: Evidence base and intelligence – understanding of the destination, current position and opportunities.

PRIORITY TWO: Destination (infrastructure) development – focus for key infrastructure development opportunities, the strategic direction and connectivity.

PRIORITY THREE: Market development – establish what markets provide the best opportunities to increase volume and value of visitors.

PRIORITY FOUR: Communication and profile – communication of location and wider offer, pinpointing position in the UK and profile as a destination of international importance.

PRIORITY FIVE: Product development – actions needed to develop new products and offers to attract new markets and extend the dwell time/return propensity of existing visitors.

PRIORITY SIX: Welcome, information, experience – improve the welcome provided to visitors, the information they receive and the overall experience they have.

PRIORITY SEVEN: Skills, business development, education and careers – developing businesses, careers and people working in, and wishing to enter, the industry.

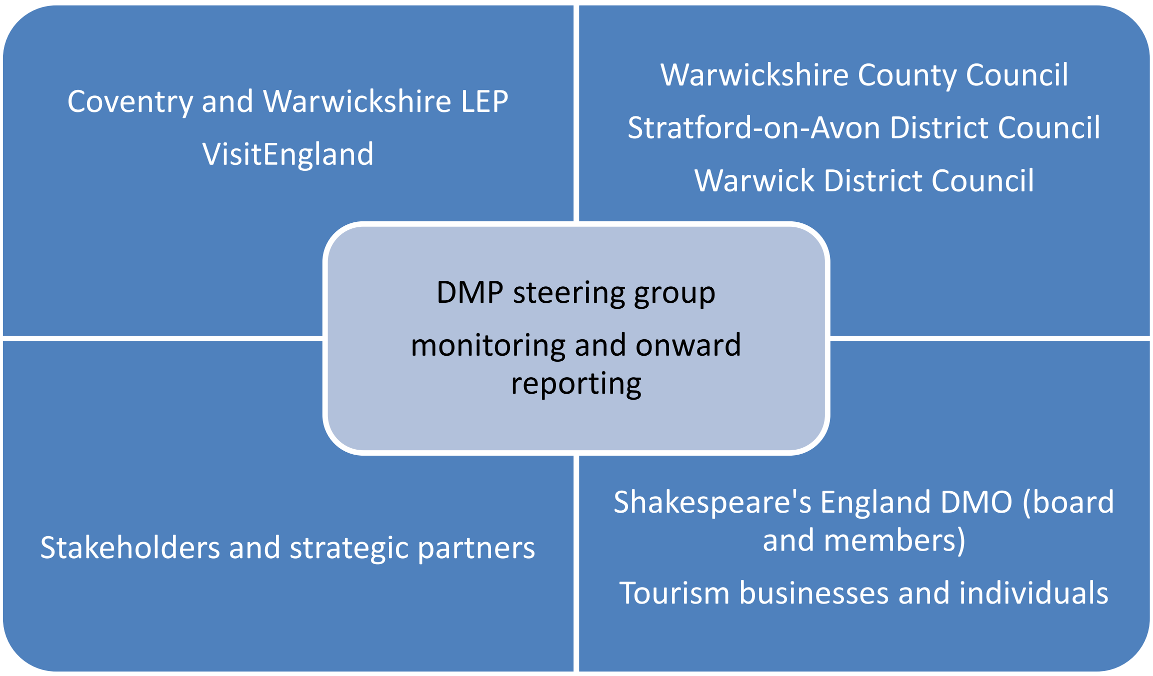
It is clear that Shakespeare's England is a leading visitor destination and brand. Marketing and promoting the destination will ensure that it is front of mind for visitors choosing their next day visit, short break or longer holiday. However, a destination management plan will ensure that the destination and its businesses are improved and developed in the round, which will lead to improved infrastructure and skills, increased jobs and economic impact and a more sustainable future for the destination, its visitor economy and the wider supply chain it supports; benefiting businesses and visitors alike.

How this will be monitored and measured

Each of the priorities will have a nominated lead, they will work to develop a focused and measurable action plan for each priority and identify the key individuals and organisations who will be accountable and responsible for their delivery.

These leads will form a steering group (DMP Steering group), which will meet twice annually, under the direction of a **chair person,** where the actions and progress will be reported.

These reports/outcomes will be made available to all partners and will form part of the visitor economy reporting for the CWLEP.



STRATEGIC CONTEXT

1. National context

VisitEngland leads the marketing of England as a visitor destination to domestic and overseas markets. In championing the visitor experience, VisitEngland is seeking to increase the value of the nation's tourism by 5% per annum over the next ten years, leading to c.250,000 new jobs.

VisitEngland's **England: A Strategic Framework for Tourism 2010-2020** sets out 4 key priorities:

1. **To increase England's share of global visitor markets.**
2. **To offer visitors compelling destinations of distinction.**
3. **To champion a successful, thriving tourism industry.**
4. **To facilitate greater engagement between the visitor and the experience.**

Government Tourism Policy sets a focus on

- Destinations: with strong industry led tourism bodies guided by VisitEngland.
- Standards: raising industry standards through improved rating systems, consumer feedback and better tourist information.
- Development: skills and product development, and bringing packages together.
- Transport: providing better infrastructure for visitors and to support the visitor economy.

Both Warwick and Stratford-on-Avon are considered to be two of VisitEngland's attract brands, reflecting England's best known destinations, via visitor numbers and consumer perceptions.

Regional Context

Coventry and Warwickshire Local Enterprise Partnership

The Coventry and Warwickshire Local Enterprise Partnership (CWLEP) plays a central role in determining the local economic priorities and undertaking activities to drive economic growth and the creation of local jobs. Their ambition is to make Coventry and Warwickshire a World Class economy in which to do business; a place to: lead a great life, excel at learning, visit and return to - all supported by exceptional private, public and voluntary services.

It recognises the value of its central location in the country, well placed on the strategic transport network and benefitting from generally good rail and road connectivity. It also suggests that the area has a strong inward investment offer with its combination of an urban and rural identity and wealth of cultural, tourism and sporting assets.
The CWLEP has developed a five year strategy 2011 to 2016, where one of the key ambitions is to accelerate the growth of the economy through targeted support in key strategic areas.

Although the main focus and priority area for development and growth is Advanced Manufacturing and Engineering, the CWLEP recognises the importance of the tourism sector in terms of current employment (approximately 40,000 people), and the quality and scale of the product located in both rural and urban areas. It sees these as a strength for the LEP area – and considers the sector to be a core asset.

CWLEP has identified 'Culture and Tourism' as a sector with 'significant growth opportunity' and recognises its role in supporting inward investment, the retention of value-added jobs, supporting employment of new talent and stimulating innovation. In acknowledging the importance of the sector, CWLEP will seek future investment through the local growth deal for tourism and European Structural Funds (from 2016/17 to 2020/21). They see Destination Management Organisations as mechanisms for providing better coordination of marketing and promotional activity which will attract more visits and bring benefits to the wider economy.

The Culture and Tourism Group will be chaired by Catherine Mallyon (Executive Director, RSC); its draft remit is to support the CWLEP 4 key objectives; Take an overview of Destination Management Partnerships; Identify strategic opportunities for the cultural and creative sectors to contribute to local growth; Identify a significant flagship project; and Explore ways of releasing LEP funding, especially as matched funding with ACE.

In addition, this group will consider involvement in specific C&W initiatives, work with other CWLEP Business Groups and consider a CWLEP C&T Conference so that wider interest groups can be briefed and can contribute.

The CWLEP prior actions around **Transport Connectivity** and **Enhancing Skill**s are likely to have benefits for the tourism sector – with infrastructure enhancements (connecting hubs, North-South links, travel between and around Coventry and the major towns, and emphasises the opportunities that would be generated through the delivery of HS2) making it easier to get to and around the area, and skills development helping to address the significant skills shortfall being experienced in the hospitality, travel and tourism sectors.

The 'SEP for the future and for bringing manufacturing home' particularly highlights priorities around **unlocking growth potential** (infrastructure, transport and digital) and **growing our talent.** Both of which will see visitor economy projects being of relevance.

Warwickshire County Council

Warwickshire Visitor Economy Framework 2013-2018

Tourism makes a key economic contribution to the Warwickshire economy and the quality of life for the county's resident population. The county has assets with national and international visitor appeal and is a popular destination for day visiting, and indicators suggest opportunities for significant future growth.

The total business turnover generated in Warwickshire as a result of tourism is estimated to be £971,315,000 or, turnover of just under £1 billion, and supported 20,800 jobs and 3610 firms (2011).

The aim of the Warwickshire Visitor Economy Framework is to guide public sector investment and collaborative partnership action to support the growth of the visitor economy and to increase its contribution to economic prosperity, employment and quality of life.

Warwickshire, as a whole, is not a coherent destination or 'brand' - it is a collection of different visitor products and experiences (including 3 'attract' brands [as determined by VisitEngland*] – Stratford-on-Avon, Warwick and Royal Leamington Spa) that visitors are accessing in lots of different ways. Delivery needs to recognise this – a 'one size fits all' approach will not be effective.

The strategy identifies the need to:

1. *Continue to attract existing markets principally:*

- Day visits from approximately an hour catchment.
- UK short breaks from a 2 to 2½ hours catchment (London and the South East, the Midlands, parts of the South West, Northwest and Yorkshire).
- Overseas markets – primarily from North America and Western Europe.

2. *Stimulate off peak business:*

- UK short breaks
- Meeting and conference visitors.
- Day visitors

The need to attract new markets is also identified, this includes new overseas markets in emerging economies in partnership with VisitBritain, VisitEngland and other partnerships.

The **Visitor Economy Framework** sets out six Action Programmes designed to address the Strategic Priorities. These are:

Destination Development Programmes for Stratford-on-Avon, Warwick and Royal Leamington Spa: Recognising the wide range of organisations involved in the delivery of the visitor experience in each town and the need to bring them together behind a shared vision.

Gateways to the Countryside: Developing the rural tourism product and infrastructure for outdoor activities in order to extend the benefits of tourism beyond the county's 'attract' destinations (attract and disperse)

Destination Marketing: Providing a single co-ordinated marketing programme under the leadership of the Shakespeare's England DMO and focusing on value-added promotional activities .

Tactical Marketing: A programme to develop private sector led tactical marketing campaigns to drive business to certain types of tourism businesses and/or boost off-peak demand, which would complement and add value to the destination marketing programme.

Digital Marketing Skills: Helping tourism operators to fully embrace digital marketing by providing them with the knowledge and skills that they need to market their businesses in the digital age.

Advocacy and Intelligence: Ensuring that there is good tourism intelligence so that the benefits and importance of tourism as an economic sector in the county can be fully appreciated – which can be used to make the case for investment in the other action programmes.

Critically the strategy recognises the importance of **clarifying the roles and responsibilities** of the different organisations in the delivery of the Visitor Economy to maximise the effectiveness of resources and reduce duplication.

A key challenge is to generate business at off peak periods – the 'shoulder' months of spring and autumn but also weekdays (in south Warwickshire) and weekends (in north Warwickshire).

The private sector is beginning to recognise that it will need to take the lead on collaborative marketing in the future.

3. District Context

The value and importance of tourism at district level is not equal across the county. The greatest value is in Stratford-on-Avon and Warwick – and this is reflected in their strategic policy documents.

Stratford-on-Avon District

The **Stratford-on-Avon Core Strategy** provides the strategic context for development decisions up to the year 2031 – and helps to promote economic prosperity in accordance with the Council's Business and Enterprise Strategy and the CWLEP Strategic Economic Plan (SEP).

Around 4.9 million people, with a spend of £336m, visit the District each year, with Stratford-upon-Avon, the Shakespeare Birthplace Trust and the Royal Shakespeare Company being of international significance. This provides significant economic benefits but also major challenges in managing the 3.5 million or so visitors that come to the town each year, while also retaining the character of the town and the quality of life for its residents. Tourism is one of the main sources of employment in the District with over 8,000 jobs supporting the industry.

Most of the District to the north of Stratford-upon-Avon lies within the West Midlands Green Belt. The Cotswolds Area of Outstanding Natural Beauty extends into the southern fringes of the District. The countryside is considered to be a major asset and supports a wide range of active and passive recreation pursuits, including an extensive rights of way network, golf courses and equestrian activities.

The heritage and built historic environment of the District is very highly valued and contributes significantly to the identity and character of the area. It also plays a key role in attracting visitors and tourists. There are over 3000 Listed Buildings within the district, as well as 75 Conservation Areas covering the centres of Stratford-upon-Avon, the smaller market towns and many traditional villages.

There is a wide range of valuable ecological sites across the District, with nearly 40 Sites of Special Scientific Interest and four Local Nature Reserves.

Tourism is considered to be a sector of economic growth and the strategy forecasts that its value will increase by 25% during the period 2011-2015, and Stratford-upon-Avon will have re-established its position in the top 20 UK towns and cities for international visitors.

The strategy identifies a number of key issues:

- It is critical that the location and nature of development does not compromise the valuable historic and natural assets of the District. Priority will be given to protecting and enhancing the wide range of historic and cultural assets that contribute to the character and identity of the District with any developments designed to maximize the benefits to local communities.
- Local distinctiveness – there is a need to protect the distinctive character of the market towns, villages and hamlets, including their settings, townscapes, streets, spaces and built form.
- Rural nature of area means lots of cars leading to congestion in e.g. Stratford at peak times – affecting quality of experiences for residents and visitors.
- Important to support the growth and improvement of existing attractions and to encourage new attractions and disperse them throughout the District, in order to support the local economy and to provide the opportunity for local communities to enjoy the benefits that are derived.
- Stratford-on-Avon represents a huge opportunity as the gateway to discover not only the town but also the surrounding attractions in the rest of Stratford District (attract and

disperse) and thereby maximise opportunities to increase the number of overnight stays, length of visitor stay and visitor spend.

- Tourism is crucial to the local economy and is facing significant challenges with ever increasing competition.

The strategy identifies different objectives for the **towns and villages** in the district recognising the differences in the type, scale and quality of their tourism offer and the different challenges and issues that they face:

- **Stratford-upon-Avon** will have enhanced its role as a town of international standing. More tourists will visit the town and stay longer, in part achieved through an expansion of its cultural offer. The Historic Spine project is aimed at making the route between Shakespeare's birthplace and resting-place more attractive and pedestrian friendly, and the intention of the Shakespeare Birthplace Trust to provide an enhanced attraction in Henley Street which will incorporate a new learning and research centre for the enjoyment and study of Shakespeare.

  The huge numbers of visitors places a massive burden on the fabric and infrastructure of such a small town, which creates tension between meeting the needs of local residents and the expectations of the visitors. This pressure manifests itself in the central area in particular, where there is a considerable conflict between pedestrians and vehicles. This affects the quality of the visitor experience and undermines the historic character of the town centre.

  Specific aspects of the town's infrastructure and services are under heavy pressure and are reaching capacity thresholds. This is the case with traffic on the road network, particularly during the morning and afternoon peaks and on certain days during the year such as Bank Holidays, when queuing and delays on routes into the town centre are considerable. Traffic causes adverse environmental impacts on various parts of the town due to noise, air quality and visual intrusion.

Stratford-upon-Avon, the birthplace of William Shakespeare is the gateway and its surrounding historic towns and countryside is a world class destination. Internationally renowned for its iconic Royal Shakespeare Theatre and five beautifully preserved Tudor homes and gardens, all directly linked with William Shakespeare and his family.

There is something to suit all needs and budgets - from unique attractions, historic buildings, stately homes, idyllic villages, health spas, golf, leisure, cycle ways, vineyards, canals, undulating countryside and winding rivers.

A wealth of local producers, independent retailers and artisans offer unique brands, flavours, products and crafts for the discerning visitor. Festivals celebrating the history, culture and traditions of the destination take place throughout the year

Visitor surveys undertaken in Stratford Upon Avon, Alcester, Shipston on Stour and Southam (2011 and 2012) confirm that the variability of the quality and quantity of the visitor offer across the district and differences in audiences, which contributes to varying lengths of stay (day visit dwell time ranges from 2.2hrs to 4.32hrs) and visitor spend. It highlights a need to look at the visitor offer in its entirety in these locations in order to increase dwell time and resulting spend.

The **Stratford-on-Avon Destination Tourism Strategy 2011 – 2015** suggests that:

- Stratford-upon-Avon itself represents a huge opportunity to be the gateway to discover not only Stratford-upon-Avon and Shakespeare's England but also the surrounding hidden gems in the historical towns and villages of Stratford District.
- There is a need to focus on needs of visitors **and** residents
- Following a period of fragmentation and lack of coordination there is a need to really embed structures, which will include a full Destination Management Plan – as an extension of the strategy.
- Behind all of this Stratford must strive to manage and implement tourism consistently and effectively, with the private sector taking a greater role in balance to the diminished funding available in the public sector.

Its vision for the district is *"By 2015 for Stratford District to be not just a leading brand within the UK, but a truly World Class Destination, renowned for the quality and depth of its visitor experience across its extensive built and cultural heritage, rural setting and landscape, and in the welcome and atmosphere it offers. Underpinning this 'must see' experience, Stratford will be an exemplar of co-ordinated and focused destination management, working effectively in partnership to improve the performance of the visitor economies and generate wider local benefits across the District to all who live, work and visit."*

Warwick District Council

The **Warwick District Council Tourism Strategy** developed in 2011 is a strategic document which provides direction and management options for the tourism service, including an assessment of partner roles and partnership opportunities.

A key principle is that the strategy recognises that some things they can do alone and some need to be done in **partnership** with others. In particular it identifies Stratford-on-Avon District Council, Warwick Town Council and Warwickshire County Council (which runs museums and country parks) as key partners.

Tourism is a major economic driver in the district with 3.1m trips a year generate more than £220m and over 4,850 jobs and attracts both UK and overseas visitors. Warwick has high brand awareness in the West Midlands region (3rd behind Stratford and Birmingham) with Warwick Castle being an attraction with particularly high recognition.

The strategy highlights a number of weaknesses in current provision/policy.

- **Strategy and leadership:** There is a need for a vision**,** key objectives and targets, and an understanding of what needs to be done to achieve success. Businesses need to be able to engage with the process and there is a need to **define the roles** of specific partners and levels of appropriate intervention
- **Business advice**: How are business advice/start up queries handled

- **Resources and partnerships**: With stretched resources there is a need to strengthen local partnerships with the private sector and key players within the County and also further afield (e.g. Oxford) to facilitate joint work and cost-sharing.
- **Marketing**: a strategy is necessary to ensure a more co-ordinated approach to activity and targeting audiences: the website/data management **is** a critical issue – with an absolute requirement that information is accurate and kept up to date. The need for print needs to be defined and the issue of Warwick branding addressed
- **Market intelligence and performance monitoring.**
- **Rural tourism**: ensuring the benefits of tourism are spread across rural areas and not just focused on the three towns.
- **TICs**: Understanding their roles, function and rationale for service provision

There are **7 guiding principles** within the strategy

- **Sustainable growth:** which is better than the national average and mindful of environmental impact
- **Value not volume:** marketing campaigns encourage visitors to stay overnight, stay longer, spend more, and to return
- **A distinctive offer:** investing in a "sense of place"
- **An inspiring message**: backing a coherent identity which builds on acknowledged market strengths
- **A strong partnership approach:** which avoids duplication and clarifies roles
- **Local ownership:** initiatives have the widespread backing of business communities
- **Quality experience**: offering excellent, easily-accessible information and joining up services to make high-quality, memorable experiences.

To achieve the vision, the strategy recommends a focus on **4 priorities**

1. **Marketing:** the destination to deliver sustainable growth
2. **Place shaping:** to create a distinctive destination experience
3. **Business engagement:** to strengthen industry-led co-ordination and advocacy
4. **Visitor services**: to enhance the quality of visitor information and welcome

** The "Attract" brands are a list of 39 of England's best known destinations, based on objective research of visitor numbers and consumer perceptions will be used by VisitEngland to sell England*

KEY FACTS, FIGURES AND INTELLIGENCE

Volume and value

Key volume and value statistics are derived from the Research Solutions 'Shakespeare's England Tourism Economic Impact' report 2012 (TEIA). This includes a breakdown down from national level data (Great Britain Tourism Survey and International Passenger Survey) and jobs and income data from the Annual Survey of Hours and Earnings, and at local level from the occupancy survey.

- 9.6 million trips were taken in Shakespeare's England – 8.8 million day trips and 0.83 million overnight visits.
- Visitors spent £417 million in the area, which is an average of £35 million spent in the local economy **each month**.
- Overnight trips account for a total of 2.24 million nights in the area. These overnight visits generated £149 million, compared with £267 million from day trips.
- **The 9.6 million trips account for a total value of tourism to the local business turnover of £547 million, which supports 9,588 jobs. These jobs breakdown as 7,508 direct tourism related jobs and an additional 2,080 non tourism jobs dependant on the multiplier spend from tourism.**

The recent TEIA study for Stratford-on-Avon District showed that 5.9 million trips were undertaken in the area (5.4 million day trips and .5 million overnight visits). These trips account for a total value of tourism to local business turnover of £324 million, and support c. 5,956 jobs both for local residents and for those living nearby. Approximately, 4,727 direct tourism jobs are supported with an additional 1,229 non-tourism jobs dependent on the multiplier spend from tourism.

The recent TEIA study for Warwick District showed that 3.71 million trips were undertaken in the area (3.35 million day trips and 0.36 overnight visits). These trips account for a total value of tourism to local business turnover of £169 million, and support c.3,843 jobs both for local residents and for those living nearby. Approximately, 2,973 direct tourism jobs are supported with an additional 870 non-tourism jobs dependent on the multiplier spend from tourism.

This is further underpinned by data from the Coventry and Warwickshire LEP, which reports that 40,000 people are employed in culture and tourism (CWLEP figures) across the entire LEP area. The total business turnover generated in Warwickshire as a result of tourism is estimated to be £971,315,000 or, turnover of just under £1 billion, and supported 17,228 jobs. (Warwickshire Tourism Impact Report 2012). The importance of the links to the cultural sector and the impact on the visitor economy is clearly identified in the infographic below:

DESTINATION AUDIT (Strengths and weaknesses)

Detailed discussions, workshops and one to one meetings with stakeholders, industry partners and public sector bodies have helped shaped a view of the strengths of the region, the opportunities presented and any issues or barriers to realising these aspirations. It is crucial that this destination management plan provides the framework to coral the strengths, identify the realistic opportunities (in the short, medium and long term) and maximise these priorities to raise the game for Shakespeare's England region.

1. Strengths

The following section provides an overview of the strengths of Shakespeare's England region which should be maximised and the opportunities it faces.

- Shakespeare's England is a world class destination – possibly the best in UK – with a very strong tourism offer. Shakespeare's England has a number of attributes which other tourism destinations do not have, and a really strong foundation on which to build and grow the visitor economy.

- The region has a central location in the country with some good infrastructure links; these include Birmingham Airport, good rail links to London and North and the proximity to Birmingham, Coventry and the Cotswolds.

- Transport to the area is good, as is location in terms of travel times. Good motorway and train links from key catchment areas. The airport is very close, and a great gateway to the region. There will be new carriers/long haul business in to Birmingham Airport, and this presents opportunities to match tourism product (or develop tourism product) to meet the needs of new markets.

- The region benefits from a strong brand presence with domestic and international recognition, Shakespeare being a particular USP for overseas markets, and three attract destinations – Stratford Upon Avon, Warwick and Royal Leamington Spa.

- Shakespeare's England is rich in art and culture, has a wealth of cultural and heritage attractions and experiences – not least Warwick Castle, Kenilworth Castle, RSC, Shakespeare's Birthplace Trust, and unique events and festivals delivered on an annual basis.

- There is a good standard of accommodation across the region from large branded 4* to independents and self-catering, there are also facilities for walkers and niche markets

- The supporting product (Retail/Eating out/local produce) is very strong with a variety of independent and specialist shops (e.g. saddlery), in Stratford, Warwick and Leamington Spa. There are a number of high quality restaurants and dining pubs, the quality of food offer has improved and there is a growing artisan community.

- There is a strong retail offer, and huge variety of retail which touches all price points – lots of independent shops (from craft to independent boutiques) and also linked to Bicester Village and its appeal. Good high street offer (vibrant) and not always homogenous high street. Potential new retail development at Birmingham airport.

- There are a number of new developments, such as JLR resort at Gaydon and Genting Casino at the NEC site. These provide the potential for new strategic partners, who will be looking to be part of the regional profile. There is a clear opportunity to sweat the 'world class' asset to attract similar world class, or high profile, organisations.

- The importance of great customer service and welcome is recognised by all partners as being fundamental to the destination. The quality of welcome across the region is of a good standard and provides the foundations on which to build exceptional customer service and welcome.

- The region benefits from attractive countryside towns (Alcester, Shipston, Henley) and quintessentially English rural countryside, as well as its riverside location (River Avon) and canals. This is further underpinned by its location close to the Cotswolds.

- Rural activities and the rural product is strong, this includes water based activities, walking and cycling. This is supported by well maintained canal towpaths, as well as canal side attractions and marinas, walking and cycle ways. Additionally, the rural product, such as the waterways also supports local industries – such as local pubs – which are located along the waterways.

- Great education and skills opportunities, linked to great employment opportunities across a wide spectrum in the region/sector.

- In general, there is a vibrant offer, for the younger market (18-30), in Leamington Spa.

- Shakespeare's England DMO benefits from a very strong board, with key partners actively involved and a distinct lack of organisational ego. The board members are clearly working for the good of the region and not putting their individual organisations first.

- The DMO is able to work with a range of partners, destinations and DMOs in the area – which is a strength for building the destination offer, and also an opportunity to help near areas, such as the Cotswolds, to be defined in relation to their connection to the Shakespeare/Stratford Upon Avon product.

2. Opportunities

Based on the strengths above, a number of opportunities are emerging:

- Due to the strong board of Shakespeare's England DMO, there is an opportunity for other 'key players' to make a connection with the region, via one focal point. The region is fortunate that the key players have come together as part of this board/organisation and this should be maximised further.

- There is an opportunity to appoint a senior and influential person to act as an ambassador or spokesperson for the visitor economy, armed with the facts about the importance of the visitor economy and what needs to be done, what the priorities are and how this can be funded/supported.

- There is an opportunity to build places within Shakespeare's England with national and international appeal – world class destinations, to complement the iconic attractions located within them. Using the strengths of anniversaries and major events with international and national appeal, as well as development proposals such as the Shakespeare Birthplace Trust ambitions for Henley Street.

- New developments (JLR resort at Gaydon and Genting Casino at the NEC site) in the area show there is a clear opportunity to sweat the 'world class' asset to attract similar world class, or high profile, organisations.

- Opportunities exist to make more use of Heart of England in connection with Birmingham and Birmingham Airport (there is a question about whether the airport name should have a wider geographical recognition)

- Make closer links between Stratford upon Avon and Leamington Spa in terms of attracting and dispersing the younger (18-30) market.

3. Issues to consider

The following section outlines those areas where there are either weaknesses in the current product/offer or where there are potential barriers to development. The region will be in a better position to compete and grow its visitor economy if these issues are considered and acted upon.

- The destination is not communicating the current offer effectively enough. The destination is 'timid' from a national perspective – there is more potential for the destination to make more of an impact regionally, nationally and internationally.

- Shakespeare's England has all of the ingredients for a great visitor destination, the issue is bringing it all; together in one offer and communicating that offer effectively.

- The overall visitor experience should be developed across the region. Shakespeare's England is a region of iconic attractions, however, the destination towns do not reflect that iconic status and should raise their games to mirror the reputation/gravitas of the attractions in their areas. The opportunities to connect to the work of the 2 BIDs in the region, as well as other BIDs including the Rugby BID, could be strengthened so that their work and the work of Shakespeare's England DMO complement each other.

- It appears that there could often be complacency about the Shakespeare/RSC/Iconic attractions connection, and little appetite or perceived need to make improvements, just 'piggy backing' or depending on the success and profile which these icons bring.

- Critical issue in terms of communication about location.

    - The ability to pinpoint where the region is in the UK and its make up is an issue. Clarity is needed to give a geographical location and a description of what experiences there are, where they are located and how easy they are to find. There is a need to better understand the 'place' which is labelled Shakespeare's England, give it a clearer sense of identity and a sense of place, connect it better and define what it means.

    - For example, Warwick Castle research shows that the Castle is the 3rd highest unprompted castle in the country but difficult to pinpoint on a map. The iconic attractions are well known but cannot be easily placed by potential visitors.

- In addition, Warwick and Leamington Spa need to better communicate their offer, and their historical significance. Leamington Spa is a beautiful old regency town, but does not have the same reputation/profile as Cheltenham and Bath, more could be done to make these connections.

- There is a need to communicate the location better to unlock potential of visitors from London/South East (domestic) and also those who are in London (overseas) and exploring England.

- Transportation to, and across the region, is an issue. The link from the airport to the region needs strengthening; the airport is a great connection but it is an issue to connect the region with 'Birmingham' as the two products are so different. The airport provides a gateway, but the name Birmingham Airport does not connect to the product Shakespeare's England.

    - In general, it is not easy to travel across the region. There are a number of very scenic public transport routes, but they are not easy to understand and therefore not easy to use. Need a really easy and joined up transport solution for visitors.
    - There is no direct bus, coach or train service from Birmingham Airport to Stratford Upon Avon or Warwick.
    - There needs to be better communication of how to explore the area from Warwick Parkway Station and other mainline stations as this is perceived as an issue.

- Parking is expensive and not joined up – each local area with own fees and not a consistent purchase price for a visitor touring the area.

- There is a need to raise the profile of Shakespeare's England DMO in towns/areas outside of Stratford-on-Avon to ensure that all potential partners and businesses are clear about what the DMO delivers, and also what else is on offer across the region.

    - There is a perceived dominance of Shakespeare and Stratford in activity (Stratford seen as a 'bubble'); there needs to be more understanding from businesses in all towns about the fact that they are part of a region and what part they play, and with the local population in terms of economic impact and supply chain support (Visitors are sometimes perceived as a nuisance).

- This also translates into a need for the board/DMO to be recognised as the power base for the visitor economy in the region, and for it to have more high profile strategic connections and linkages. The board should be in a position to develop strong links with powerful organisations such as JLR and provide the rationale for why these organisations would want to be connected to/patrons of Shakespeare's England.

- Whilst the destination is home to cultural icons, there must be a better connection between culture and tourism, a clearer cultural identity to maximise the value of culture.

- Public realm, the look and feel of the towns (street scape), should be more consistent and viewed in a whole to develop a 'sense of place' wherever a visitor is within the region. For example, consistent welcome signage and finger posts. In addition, the movement of visitors from major attractions to the town centres must be improved with better pathways and signage.

- Overall welcome and destination understanding can be patchy – welcome must be improved at key touch points and the visitors should be able to access information in the easiest possible way. There is also an issue with unconnected visitor information provision and general product knowledge, and the potential for disconnect and duplication of effort with competing on-line offerings.

- In terms of product, consultees commented that there is a perceived lack of quality hotels to again, mirror the world class attractions.

- There is also little 'night-time' economy in the towns, again, which is in conflict with the evening appeal presented by the theatre and other evening events or late openings of attractions. The towns do not feel like they are 'buzzing' centres, and therefore, do not provide the reason to stay on, thus reinforcing the day visit market rather than developing the overnight/weekend break opportunity. This also has impact as it does not attract the younger (18-30) market

- The waterside and rivers are not maximised, both as attractions and as a mode for moving visitors around the region. Potentially the canals and waterways are not considered as an attractor by visitors to the area in comparison with other areas (such as Norfolk) which are known for their canal holidays.

- The (destination) strategic position, focus and evidence should be clearer and more joined up, to really set the scene for what the visitor economy means to the region and what the opportunities are.

  - There is too much dilution via too many strategies and disparate volume/value figures does not present a hard hitting and consistent picture.
  - It is perceived that there are ‘lots of fingers in lots of pies’ and that a trick is being missed in using/briefing those partners who have the ears of major players who could benefit the region.

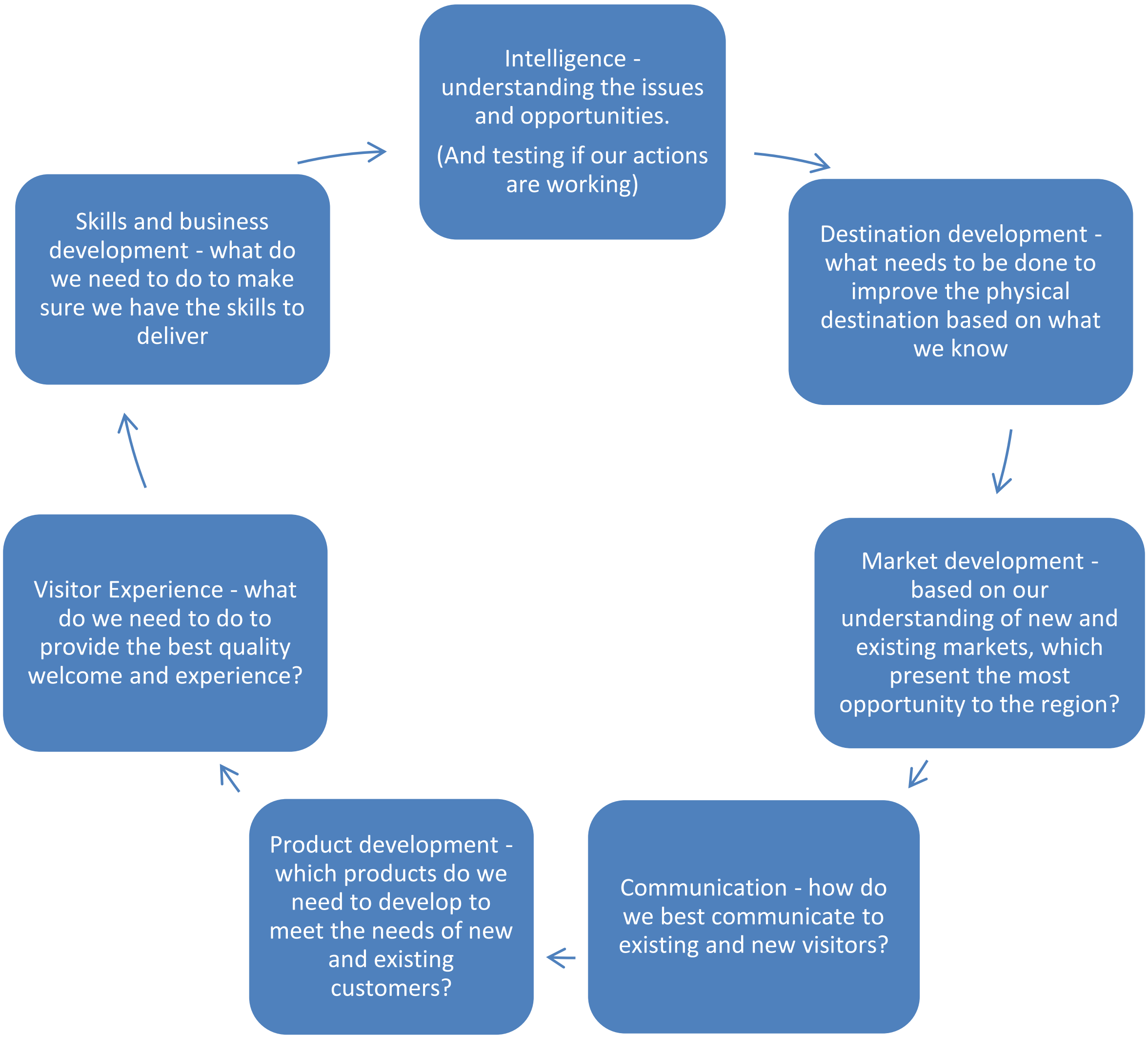
- The region is not seen as a long holiday option, it is day visits and short breaks, and possibly a touring base for the region and Cotswolds. Whilst positive that certain attractions are part of days out from London tours, it does not mean that visitors are staying longer or exploring the area.

PRIORITIES AND ACTIONS

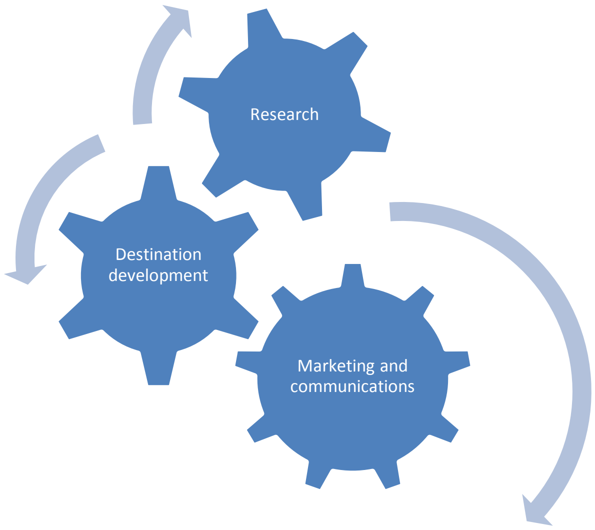
The information gathered through assessing the strengths, issues, barriers and opportunities presented to Shakespeare's England region gives a clear direction to this destination management plan and sets out a route map for priorities and action.

Each of the priorities set the scene for implementation across the destination management plan.

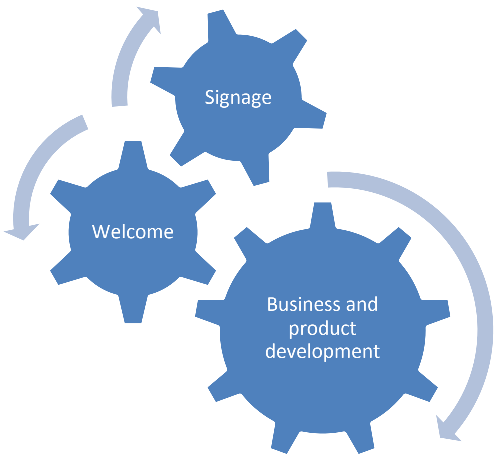
These can be undertaken in tandem and although some rely on the delivery of other priorities, much can be started as soon as possible.



It is important that these priorities are connected, and not delivered in isolation as there is a clear connection between each one in their implementation. <u>For example</u>, on both a macro level:



And a micro level between individual actions:



The following section outlines the headline priorities for action, and the lead for each area. The detail of the framework for action is outlined in ANNEX ONE, however, it will be the role of the priority lead to develop a focused action plan to realise the aspirations of each priority.

PRIORITY ONE: Evidence base and intelligence

This priority underpins much of understanding of the destination, where we are and what our opportunities are.

Research and intelligence must be consistent and collected across the region, turning this intelligence into the evidence will be crucial to underpin and give a rationale to identified development opportunities and potential funding bids. Similarly, this intelligence will be fundamental in focusing future work, in understanding and identifying growth potential, target markets and inward investment. There must also be a mechanism to bring together public and private sector, including members, VisitEngland, VisitBritain, the Observatory and the LEP to ensure the co-ordination of this information.

LEAD: TBC

Consistently record evidence and intelligence	Develop a research group Gather and share data Develop research projects
Feasibility studies	Review accommodation needs/potential across the CWLEP region

PRIORITY TWO: Destination (infrastructure) development

In terms of physical destination development, this priority provides the focus for key infrastructure development opportunities (from signage to scoping new developments) and the strategic direction and connectivity required to implement the identified needs.

LEAD: TBC	
Maintain a strategic focus for the development of the visitor economy	Ensure the adoption of the DMP with all public sector partners Maintain support for, and actively identify, all activities which have a positive impact on the visitor economy
Review transport and transport links	Create a transport/planners group and/or assimilate proposed actions into current working groups
Improve gateway signage and welcome	Create a signage group (linked to transport/planners group) to take a holistic view of signage across the region Provide welcome training for all gateway staff (linked to Welcome/business development) Review welcome signage at Birmingham Airport
Consider development projects	Conduct a feasibility study into the redevelopment of a spa for Leamington Spa (linked to the work of the research and intelligence group)

PRIORITY THREE: Market development

This priority outlines how we decide what markets provide our best opportunities to increase volume and value of visitors.

Shakespeare's England region has a broad appeal and attracts a wide range of visitors, across a wide range of markets. It will be crucial to develop new markets which provide opportunities for the best growth, to assess the offer of the destination in terms of its product market fit, its appeal to new markets, and the process of how we can develop the product to appeal to their needs.

LEAD: TBC

Scope opportunities in new markets

Use evidence base to be clear about new markets and their potential

Scope opportunities to develop business tourism

PRIORITY FOUR: Communication and profile

This priority focuses on the need for Shakespeare's England region to better communicate its location and wider offer, pinpointing its position in the UK and its profile as a destination of international importance. It provides opportunities for closer joint working on digital platforms and focused, joined up branding.

LEAD: TBC

Communicate destination location message	Set up a brand and communications group Develop and implement a focused and co-ordinated tourism campaign
Join up staffing and resources	Join up the resources of the local authorities, particularly the town teams and those with tourism remit
Co-ordinate on-line presence	Set up an on-line focus group to agree and implement a social media plan, a way forward for web providers and condordat between promotional sites
Develop strategic partnerships	Create new partnerships and ways to utilise iconic brands to further raise the profile of the destination

PRIORITY FIVE: Product development

Opportunities for product development have been identified; this priority outlines the key actions needed to develop new products and offers to attract new markets and extend the dwell time/return propensity of existing visitors.

LEAD: TBC

Maximise the cultural economy and the value of culture to the region	Develop the theme of creativity across the region Use 2016 as a catalyst to highlight
Profile and promote anniversaries and major events and festivals	Focus all 2016 activities across the region Consider the appointment of a festival director Set up a shared platform for collating event information
Develop new opportunities for joint promotions and ticketing	Improve ticketing options between sites - investigate joint tickets or passes Review needs and wants of key market segments Consider ticketing with rail/attractions Produce new leaflets and foreign language leaflets
Develop packages for tour companies	Build activity from London Develop a scenic bus service across the region and support existing operators
Improve offer for visitors	BIDs and Chambers of Trade to work together to review opening hours and seasonal/evening activities

PRIORITY SIX: Welcome, information, experience

There is an identified need to improve the welcome provided to visitors, the information they receive and the overall experience they have in the region from businesses and local residents alike to the offer, from joint-tickets, packages and special promotions. This priority focuses efforts around this theme.

LEAD: TBC

Visitor information strategy	Commission a comprehensive visitor information strategy
Improve customer care and welcome	Develop a focused customer care training scheme for all businesses, which connects to business development opportunities
Improve product knowledge	Develop a regular programme of familiarisation visits Plan and implement an industry passport Implement a local residents weekend or promotion, linked to English Tourism Week Involve local residents in tourism activities Create top 20 things to do and see for front of house

PRIORITY SEVEN: Skills, business development, education and careers

The development of careers and people working in the industry has been identified as a priority – the actions in this area will focus on skills, business development, apprenticeships and better working relationships between employers and education.

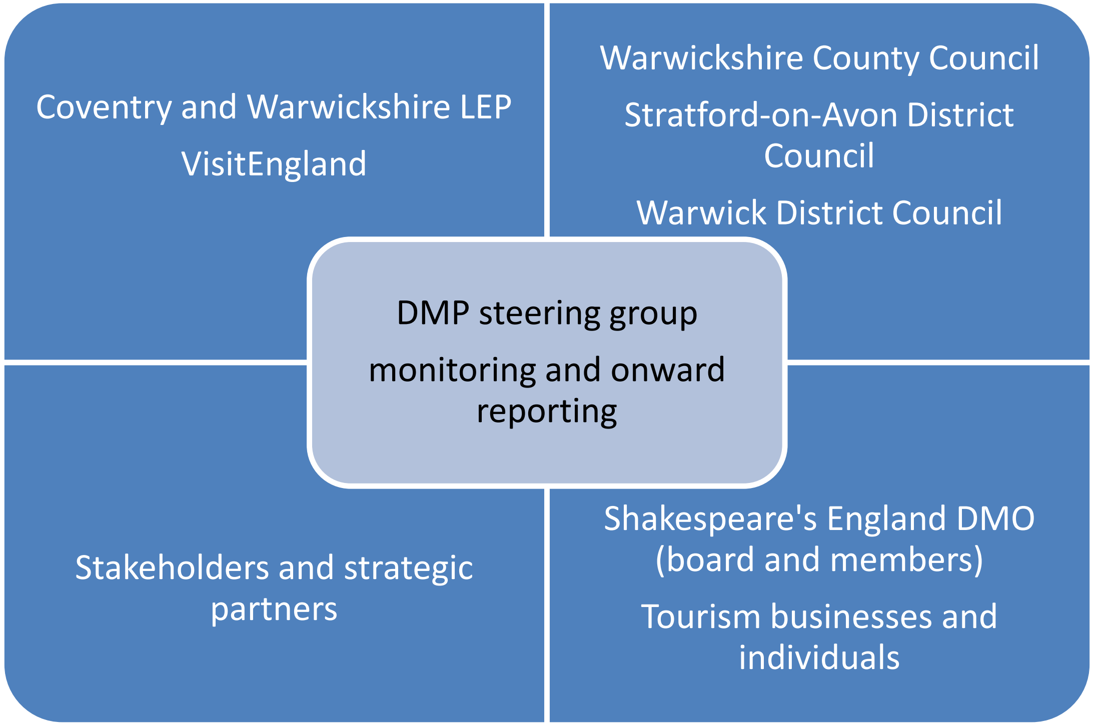
LEAD: TBC

Develop an employers forum	Link employers with schools and colleges - placement and apprenticeships Profile career opportunities in region Better connect education and product
Focus business development for the industry	Develop a dedicated business support and skills package for businesses

ANNEX ONE: PRIORITIES AND ACTIONS – A FRAMEWORK FOR ACTION

The following section outlines a framework for action under each priority. These actions will be formalised by the relevant action group, and monitored/measured by the identified leads. The outcomes will be reported via the DMP steering group to the identified strategic partners and business groups, using the model outlined and described:

The DMP steering group will have an agreed chairperson.



PRIORITY ONE: Evidence base and intelligence

This priority underpins much of understanding of the destination, where we are and what our opportunities are.

Research and intelligence must be consistent and collected across the region, turning this intelligence into the evidence will be crucial to underpin and give a rationale to identified development opportunities. Similarly, this intelligence will be fundamental in focusing future work, in understanding and identifying growth potential, target markets and inward investment. There must also be a mechanism to bring together public and private sector, including members, VisitEngland, VisitBritain, the Observatory and the LEP to ensure the co-ordination of this information.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Consistently record evidence and information in relation to the economic impact of the visitor economy	Agree to gather and share consistent jobs and economic impact information across the local government, LEP partners and the private sector, particularly considering all relevant sectors within the visitor economy (in addition to hospitality)			
	Set up a research group between public sector, accommodation providers and attractions to share data and information, with clear terms of reference which include: ▪ Develop the evidence base – from economic impact through to ROI for partnership working ▪ Consider the widest visitor economy impact and the impact of culture. ▪ Develop a programme of key research studies to better understand the current and potential markets (domestic and internationally) ▪ Work with the LEP to deliver gap analysis research, looking at product and product development need (accommodation, attractions, etc) ▪ Improve the presentation and communication of the information ▪ Monitor growth in volume and value across the region			

	This group should also lead/ensure the implementation of: ▪ Work with Coventry University and Serious Games on a data modelling project 'catapult' project. ▪ Conduct a monthly how's business survey to assess business levels across Shakespeare's England Region ▪ Conduct regular occupancy and stock analysis ▪ Prepare a detailed product Inventory: Understanding the product and what there is in the region and what are the needs for the future ▪ Explore use of new technologies to collect visitor feedback on a regular and consistent basis.			
Accommodation feasibility study	Commission a feasibility study to review the accommodation development potential of the region, particularly to consider a named boutique hotel (5*), to provide adequate evidence base for perceived, potential and future demand *(**This study could possibly cover the entire CWLEP boundary and be a wider project)*			

PRIORITY TWO: Destination (infrastructure) development

In terms of physical destination development, this priority provides the focus for key infrastructure development opportunities (from signage to scoping new developments) and the strategic direction and connectivity required to implement the identified needs.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Strategic focus for the development of the Visitor Economy	Ensure all local government partners adopt the DMP and use this as a framework for visitor economy development in the region; considering implications and impact of developments the visitor economy			
	Ensure all local government partners support activities which will have a positive impact on the visitor economy, such as historic spine and the Shakespeare Birthplace Trust proposals around an enhanced attraction in Henley Street.			
Review transport and transport links, to the region and across the region	Create a planners/transport group led by the local authorities, which considers the key issues raised in relation to transport: ▪ Review public transport routes in region (how to explore the region), particularly the transport matrix for a tourists/local residents alike to make it easier to use public transport between Stratford, Warwick, Kenilworth and Leamington Spa (to include branding and information) ▪ Review public transport routes to the region (how to get to region) ▪ Consider better traffic management systems in the main towns, particularly Stratford Upon Avon and the need for a ring road ▪ Direct bus route from Birmingham Airport to the region ▪ Direct train from NEC/Birmingham Airport to Stratford Upon Avon, and a fast train from Birmingham for the day visitor market. ▪ Develop safer cycling routes around the towns, and work to attract cyclists ▪ Review transport options to key employment hubs and for staff working in the industry.			

	▪ Improve promotion for park and ride scheme			
Improve gateway welcome and signage	Set up a signage group (linked to planners/highways group) which takes a holistic view of signage across the region, and particularly reviews welcome signage and brown signage. With clear terms of reference which include. ▪ Prepare a joined up signage strategy for Shakespeare's England region, to include welcome and brown signage which will result in consistent signage, both welcome, directional (from spine roads) and in destination ▪ Station improvement to reflect the brand, and clear signage to relevant town. Consider developing a 'friends of' community scheme with local stations to improve welcome (floral baskets etc.) and tourist information point or information board on arrival. ▪ Make more of the gateway opportunities to profile location and offer through consistent welcome signs (picture signs) - Pinpoint location on maps and signs ▪ Develop maps and clear information at entrance points and in key towns, including stations and improved signage and information at terminus stations and feeder stations. ▪ Ensure clarity in welcome signage (How do you know you are there (links to signage and consistent street scene, branding))			
Gateway welcome training	Provide welcome training for all station staff (bus and train) – see welcome/business development section.			
Airport signage and welcome	Welcome signage at Birmingham Airport (link to the heart of England)			
Redevelop a Spa in Leamington	Key project to conduct a feasibility study into the redevelopment of the 'spa' for Leamington Spa.			

PRIORITY THREE: Market development

This priority outlines how we decide what markets provide our best opportunities to increase volume and value of visitors.

Shakespeare's England region has a broad appeal and attracts a wide range of visitors, across a wide range of markets. It will be crucial to develop new markets which provide opportunities for the best growth, to assess the offer of the destination in terms of its appeal to new markets, and the process of how we can develop the product to appeal to their needs.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Scope opportunities in new markets	Use the evidence base to be clear about new markets and market potential, and particularly consider: ▪ Review the availability of attractions and attractors for the younger emerging markets; clearly domestically, the region has the propensity to be a young and trendy region ▪ Characteristics of international markets and their needs – packages, FIT, language, consumption packages ▪ Review the opportunities presented by key overseas markets and what the destination will need to look like to attract these visitors (China, Russia and Indian emerging markets) ▪ Review local resident understanding of the offer available and the volume/value of the Visiting friends and relatives market. ▪ Build the business tourism and incentive travel sector ▪ Work closely with the universities and colleges to connect with international students and their families, and develop propositions to a) link status of destination with performance of educational establishments b) encourage attendance c) give ideas of places to visit in the area while studying/visiting			
	Scope new opportunities to develop Business tourism, which includes the incentive travel sector, and leads to a clear business tourism strategy for the region.			

PRIORITY FOUR: Communication, marketing and profile

This priority focuses on the need for Shakespeare's England region to better communicate its location and wider offer, pinpointing its position in the UK and its profile as a destination of international importance. It provides opportunities for closer joint working on digital platforms and focused, joined up branding.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Communicate the destination location message (pre-arrival)	Set up a brand and communications group, with a remit to produce an agreed set of guidelines for external communications and marketing, and a plan with outcomes. With clear terms of reference which include. ▪ Modernise the image of offer (linked to market development) – alongside the image of Shakespeare show off the modern attractions in the area – a reason to come in addition to the Shakespeare connection. ▪ Develop messages which provide clarity in terms of the sense of place, identity and location (Where is Shakespeare's England?, How do you get there, and when you are there, what is there to do?, What is Shakespeare's England? What is on offer? Detail it, set it out … For example 4 county/market towns, 1 internationally renowned theatre company, 1 world class play write, 2 iconic castles, XX celebrated anniversaries ..) ▪ Capitalise on key events such as 2016 celebrations and the 2015 RWC ▪ Create agreed key messages that can be used by every stakeholder – create a set of guidelines for the use of these messages. Disseminate for businesses to use/follow. ▪ Destination location communication, linked to Heart of England and close working with Cotswolds/Birmingham/Coventry ▪ Develop an image library, which is easily accessible and contains agreed hero shots.			

	▪ Develop opportunities to promote the region as an ideal area for events, and profile what is on offer. For example, the two racecourses, the possibility of attracting a motorsport show for the area, Fringe Theatre and a new Children's literary Festival. ▪ Develop opportunities further joint marketing/profile for the region between all key partners – sweating and sharing the asset of Shakespeare's England and sharing the 'icon affect' across the region.			
	Develop and implement a focused and co-ordinated tourism campaign which encourages cross promotion between partners and enables wider engagement, through broadening product range and bring in other partners (leverage within private sector), and which uses consistent branding, messaging and imagery. *This campaign will be informed by the work of the branding/communication group and built on the outcomes of the work of this group*			
Joined up staffing and resources	Join up the resources of the local authorities. Ensure that the Town Centre Managers and officers with a tourism remit work towards a clearly defined plan for the area. Ensure that there is a co-ordination of effort with the officers towards common goals.			
Co-ordinate on-line presence	Set up an on-line focus group, as a sub group of the brand and communications group, which will: ▪ Agree and implement a clear social media plan for all the key bloggers and social media users in the region – (RSC, SBT) clear hashtags and key messages. ▪ Convene a web providers meeting to discuss how they can better serve the area. Develop a better framework for connecting websites and providing a joined up approach for the consumer.			

	▪ Create a concordat which can be agreed and adopted by all promotional sites. This will mean there is a shared tone of voice and focus, and an agreement which enables the private sector to be sure that all promotional sites are working to the same guidelines.			
Strategic partnerships	Work with Shakespeare's England partners to create action plans to develop new strategic partnerships and strong relationships with quality brands, use icons to attract icons, such as developing a relationship with JLR.			
	Review the Shakespeare's England DMO board regularly and invite key strategic partners to work with/join the board of the DMO. The board must be a clear driver for facilitating strategic partnerships.			

PRIORITY FIVE: Product development

Opportunities for product development have been identified; this priority outlines the key actions needed to develop new products and offers to attract new markets and extend the dwell time/return propensity of existing visitors.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Maximise the cultural economy and the value of culture to the region	Develop the theme of creativity across the wider LEP area (RSC, technology, AME, the games industry, JLR, Shakespeare, SBT) leading to a focus on Capital of Creativity which joins up the regional offer under one banner of Creativity. ▪ Use 2016 as a catalyst to highlight the creativity of the region (Culturally, manufacturing, skills and workforce) under one banner of Creativity.			
Profile and promote anniversaries and major events, and improve events and festivals information and promotion	Focus all 2016 anniversaries, across the region, rather than in specific locations and places (Shakespeare plays road show for 2016, for example – a festival of Shakespeare across the region) and capitalise on the new attractions planned for 2016. Maximise all opportunities as separately and together these will significantly improve Stratford Upon Avon's offer permanently. Consider the appointment of a 'Festival director', drawing the region together to look at 2016 and onwards to City of Culture bids			
	Set up a shared platform for collating event information for distribution for key channels throughout the destination.			
Develop new opportunities for joint promotions and joint marketing	Improve ticketing options between attractions – investigate a joint ticket or pass to the main attractions in the area. Link this to clear itineraries to explore the region, particularly itineraries for target groups – families, young people, and VFR help show how close the attractions are to each other and provide value is a shared ticket approach. Look to use 2016 as a catalyst and trail run for this.			

	Review needs and wants of key market segments and develop packages and promotions with appeal to that segment (particularly 18-30 market)			
	Consider combined ticketing with rail/attractions, discounts and ability to use tickets on various modes of transport.			
	Produce new leaflets and develop on-line services, such as a good area map of attractions (leaflet and physical – see welcome) and events/what's on – bring the other local authorities together to share information on what's on in the region.			
	Develop foreign language leaflets and digital media for visitors from overseas			
Developing packages for tour companies	Build activity from London, with both individuals and coach/tour companies: Create a 'Shakespeare's England Region offer' rather than key iconic attractions (Shakespeare Birthplace Trust, Warwick Castle etc) being included in other honey pot tours for days out from London.			
	Develop a scenic bus service across the region and support those already in existence (To include the Cotswolds: bus to Cotswolds from Stratford)			
Improve offer for visitors	BIDs and Chambers of Trade to work together to review opening hours of shops and restaurants, to coincide with major events and seasonal activities.			

PRIORITY SIX: Welcome, information, experience

There is an identified need to improve the welcome provided to visitors, the information they receive and the overall experience they have in the region from businesses and local residents alike to the offer, from joint-tickets, packages and special promotions. This priority focuses efforts around this theme.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Visitor information strategy	Work with the LEP to commission a comprehensive visitor information strategy to review the needs for visitor information across the region and to consider joined up working, new technologies and management structures for delivery, and which particularly considers: ▪ TICs and visitor information services ▪ Digital opportunities ▪ Partnership opportunities ▪ In destination visitor information **this action should link to the work of the signage group and visitor welcome activity*			
Improve customer care and welcome	Develop a focused customer care training scheme for all businesses in the region, which focuses on welcome and customer service improvements, linked to key touch points. Connected to overall business development action (priority seven)			
Improve product knowledge across the visitor economy with providers	Develop a programme of familiarisation visits to all key attractions and events across the year for front of house staff and members of Shakespeare's England DMO.			
	Plan and implement an industry passport for use by industry staff across the year to visit attractions under their own steam			
	Develop and implement a local resident's weekend or promotion, which will encourage local people to visit local attractions and			

	increase their awareness of what is on offer (for VFR development) – to coincide with English Tourism Week.			
	Develop opportunities for local resident involvement in the visitor economy, consider volunteer and champions programmes			
	Create a top 20 must do list for all hotels/front house staff to refer to			

PRIORITY SEVEN – Skills, business development, education and careers

The development of careers and people working in the industry has been identified as a priority – the actions in this area will focus on skills, business development, apprenticeships and better working relationships between employers and education.

ACTION	PROJECT/DETAIL	LEAD	PRIORITY	FUNDING
Develop an Employers forum and employer led approach to careers/education	Link employers with schools/colleges in discussion about needs – placement and apprenticeship and future employment. This should include Stratford College, Warwick University, Coventry University, Warwick school, Warwickshire College and others			
	Profile career/employment/skills opportunities in the region – from universities to apprenticeships			
	Ensure a better understanding of how education connects to the product and to servicing the product.			
Business Development for the tourism industry	Dedicated business support and skills packages for businesses. This should include: ▪ Service, welcome and customer care; accreditation scheme and badge across region similar to 'world host' ▪ Business development opportunities (business profitability improvement) ▪ Business planning ▪ Contingency planning ▪ HR, Law and H&S procedures ▪ Social media, digital and marketing training and development **this project can potentially cover the wider CWLEP area*			

Shakespeare's England SWOT

The following SWOT is the result of various consultations and discussions with partners, businesses and individuals in Shakespeare's England region, and has been used to give direction to the priorities and focus for this Destination Management Plan.

STRENGTHS

Places/Public Realm
Strong 'brands' with international recognition
3 'attract' destinations – Stratford Upon Avon, Warwick and Royal Leamington Spa.
Wealth of cultural and heritage attractions and experiences.
Sizeable and growing catchment population for day visits.
Recognition of need to deliver quality visitor experiences.
BID's in Leamington, Stratford and Rugby.
Manufacturing and Engineering businesses bring in overseas suppliers.
2 excellent universities in vicinity.
Shakespeare USP for overseas market.
Attractive countryside towns- Alcester, Shipston, Henley.
Rural countryside, River Avon, walking, canals and close to the Cotswolds - Walking trails
Unique events and festivals, rich in art and culture
Affluent and Smart
Different periods of architecture

Business Tourism
Business Tourism of Coventry- number of conference and exhibition venues around Coventry; good conference facilities in larger Stratford and Leamington hotels.

Retail/Eating out/produce
Good independent and specialist shops (e.g. saddlery) especially given size of Stratford. This is similar for Leamington Spa.
High quality restaurants and dining pubs.
Quality of food offer has improved and a growing artisan community.
Shopping diversity, market/spa towns to Bicester Village
Leamington Spa has a strong nightlife offer.

Transport/access
Good access: Central location in country with some good infrastructure links.
BHX airport; good rail links to London and North.
Proximity to Birmingham, Coventry and the Cotswolds.
Well maintained canal towpaths, as well as canal side attractions and marinas, walking and cycle ways.

Strategy/Policy/Public Funds

Councils have tourism policies in place
LEP recognition that it is a sector with growth opportunity.
Tourism focus groups around region.

Accommodation
Good standard of hotels from large branded 4* to independents and self-catering.
Stratford Upon Avon youth hostel caters for walkers and overseas visitors

Welcome
Good welcome and level of customer service 6 (Stratford).
Several attractions part of welcome host scheme.
Towns clean and tidy, with clear efforts made to maintain appearance.
Safe, secure, clean and tidy area
Good attitude of residents

Service and Information
Comprehensive websites on offer.
Car park free and easy to access with good facilities (Stratford)
Interesting historic buildings with interpretation panels (pharmacy, Warwick House etc.).
Sense of community – family-friendly, events, markets and independent shops.
Coach driver's facilities.
TIC's in Stratford, Leamington, Warwick, Rugby (in library in Kenilworth and Nuneaton)

Signage
Signage in some towns is good.

WEAKNESSES

Places/Public Realm
Different levels of support – not a priority in all districts; major differences in the volume and value of tourism across the county.
Complex destination – with different levels of development and requiring differential levels of support.
Seasonality.
Lack of coherent brand for whole area.
The countryside product lacks appeal and depth of offer in nearby Cotswolds and Peak district destinations.
Some destinations not fulfilling their potential
Northern parts of Warwickshire have a weaker tourism product and lack market appeal beyond day trip or special interest markets.
Poor evidence base particularly in relation to performance related data market demand, growth prospects and visitor perceptions.
Warwick's visitor offer is not compelling and dwell time in the town is limited.
Kenilworth and Warwick's castle are situated away from the towns.
There does not appear to be much activity for teenagers
Day trips are too easy
Tacky image

Ugly buildings by sides of roads
Losing identity

Retail/Eating out/Local produce
Warwickshire unlikely to be perceived as a food destination.
Lack of Sunday or evening opening for many of the retail outlets.
Lack of high end restaurants
Empty shops in towns
Closing times of businesses (5.30pm)

Transport/access
Public transport between towns, and transport links between north and south of county
(Rural nature of 3 counties impacted by poor public transport)
Poor Infrastructure
Transport links- International+HS2 an issue in future
Bad planning, too many traffic lights and traffic jams
Road congestion at peak times.
Parking charges in Stratford. Limited parking Warwick.
Poor Train services/stations
Speed of rail line
Poor usage of Stratford Parkway
Poor access from airport to regions
First impressions at entrance stations

Business Tourism
Lack of conference rooms in region
No 5 star hotel/ hotel for large conferences

Strategy/Policy/ Public Funds
Reduction in public sector funding.
No 5 year Strategy for Tourism across region.
Policies talk about need to attract and disperse visitors-no clear indication of how to achieve this.

Accommodation
Limited accommodation provision in Leamington Spa including caravan accommodation.
Expensive accommodation, no budget options
Hotels lacking in Leamington and Warwickshire

Welcome
Room for improvement in terms of welcome and level of customer service.
Need to improve visitor welcome across borders.
More training on service provision and a co-ordinated approach for training
Not much activity for teenagers
Locals perceive tourism as negative
Visitor welcome/ Ambassadors
Not good welcome for coach drivers

Service and Information
Need to enhance visitor information, visitor services as the current TIC structure is disjointed.
Duplication of marketing activity in southern parts of County.
Overhaul of print and digital information needed.
Too many websites – too much duplication
The TIC's could be operated more effectively
More itineraries
Markets are poor quality in Stratford
Better co-ordination of events and festivals (particularly the Christmas markets); and a co-ordinated central website for what's on
Ticket prices are high
Shakespeare could be negative for other towns: Shakespeare but 'so much more'

Signage
Some signage issues in key towns – it is easy for visitors to lose their way.
Better visitor information and signage needed at key points.
Weak welcome and branding

OPPORTUNITIES

Places/Public Realm
Staycation.
New emerging overseas markets.
Development of off-season breaks.
Attract and disperse. 'Something for everyone'
Business tourism spin-offs from Coventry and Birmingham.
Increase length of stay for day visitors through enhancement and better promotion of the offer in key towns and villages.
Shakespeare 400 commemorations in 2016 (focus for the RSC and Birthplace too).
Rugby world cup in 2015.
DMO – Shakespeare's England.
Growing value rather than necessarily volume.
Attract and disperse.
Delivering quality.
Extending the season (and in a few places this was linked more to MICE market).
New Tourism attractions (tbc)

Transport/Access
LEP priority to enhance transport infrastructure
HS2
Increased usage of navigable canals and waterways.
South Stratford near to Cotswolds (strong destination brand)
Developments in rural tourism, promotion of cycleways, development of country parks to attract more tourists.

Strategy/Policy/Public Funding
Focus on partnership and collaborative working.
Possible additional funding streams from 2016 – 2021.
GRO Warwickshire - Growing Rural Opportunities for the villages and small towns of Stratford, Warwick and Rugby Up to £2.5m for Warwickshire to support rural projects.

Service and Information
Initiatives for 'welcome host' or rural tourism workshops/ support.
Joint interest in marketing between visitor attractions. While Big Ticket does not appear to have been a success there could be other ways attractions work together.

<u>THREATS</u>

Places/Public Realm
Reduced private sector funding
Age range and appeal to all markets
Continued fragmentation
Lack of consistency
Individual attractions are more important than destinations in North Warwickshire and potential to develop a destination brand is limited there.
Visitor experience needs to be improved to develop compelling destination.

Strategy/Policy/Public Funding
Reduction in public funding/ staffing.
Intelligence – fragmented, not a joined up story

Service and Information
Advancement in digital technology in tourism which is not being embraced in area.

ANNEX THREE: VISITOR SEGMENTATION/MARKET ANALYSIS

Visitor segmentation

The following gives an overview of the market segments which are most relevant to Shakespeare's England.

Trendies: These groups are 'young, free and single', often followers of fashion with a high spend on leisure. These groups can possibly be students of Warwick or Coventry University and are likely to flat share in Leamington.

Traditionals: This group is mainly retired couples, empty nesters or single people. They have good local knowledge but may not visit attractions on their doorstep. They are often traditional in their view and resistant to change. *(Large percentage of residents in Warwickshire)*

Families: Mainly family units looking for child friendly day trips, they tend to network with other young families but do not have much free time.

Culture Vulture Couples: Looking for new options/ educational experiences and followers of trends. They tend to read and research leisure offers as they do not have much free time.

Cosmopolitans: Strong interest in art/culture, and tend to do what they want rather than follow trends. They have a full active lifestyle, and are interested by café culture, shopping at weekends and nights out.

High Street Junkies: Keen to follow when a trend has been established, and like well known brands. They are an active segment that is moderately interested in intellectual pursuits, arts and culture.

Business travellers: This group **would visit** Coventry and Warwickshire on business. They are usually high spenders in innovation and technology.

International Visitors: Chinese, Japanese, American, European. 'Pilgrims to Stratford'
New European settlers: This group consists of families from EU countries who have relocated to Warwickshire or working in the area. This also connects to the VFR potential.

<u>Visitor market analysis</u>

Based on Shakespeare's England DMO market intelligence and other key research (such as the recent Arkenford report commissioned by Warwickshire County Council) the following outlines the importance of particular markets to the region.

1. **<u>Staying Leisure</u>**

a) UK General

This the most important market for Shakespeare's England Region. The market will be primarily short breaks (1 to 3 nights) staying in serviced accommodation although there will be some longer (6-7 night stays) associated with self-catering in the area.

This group will be motivated by a desire to relax and get away for a bit, undertaking a range of activities during their stay – shopping, attractions, walking etc. These will not necessarily be in the immediate locality of their accommodation and will involve trips through the destination and beyond Warwickshire, particularly the Cotswolds. This segment will be strongest in the south of the county.

Visitor characteristics will vary but visitors are most likely to be: ABC1s, 45+, travelling as couples. A proportion of this market will be older people on coach breaks. Hotels are likely to be using this market to boost off-peak demand.

b) Special interest

There is clearly the opportunity to attract a series of other special interest staying visitors. Size and characteristics of these groups will vary. They will include:

- Golf breaks/Spa breaks
- Canal boat holidays
- Festivals and Events
- Theatre
- People attending sporting events and visiting sports teams

2. General Day visits

The day visit market across Warwickshire will be complex motivated by a range of factors or activities. The common characteristic of day visitors will be their origin – the West Midlands metropolitan area will be the largest source, followed by Warwickshire itself, and then surrounding counties - relative importance will vary depending on location in the county.

A significant proportion of the day visitor market will be driven by a general day out – typically destination (as opposed to activity) focused ('Let's go for a day to ....) and activities could include pottering around, some shopping, eating out, exploring etc. Popular destinations will include Stratford, Leamington Spa and Warwick.

a) Attractions

Attractions provide a key reason for day trips in the county. Visitor characteristics will vary according to the nature of attractions but this segment will be more family orientated than others. The exception would be the National Trust and Gardens attractions which attract an older/early retired couples market primarily.

A proportion of this segment will be travelling by coach. This segment will also include school and youth group visits. The attraction will be the primary focus for a trip. The level of ancillary activity in the wider destination by this market will depend on the dwell time in the attraction and its connections with, and the appeal of, the surrounding area.

b) Shopping

A day out shopping – possibly combined with other activities (certainly eating out). More of a couples market – mainly focused on Stratford and Leamington Spa. Among day visitor markets, these will be the highest spending.

c) Countryside

Visits will be primarily for walking with some cycling and possibly some fishing e.g. at Kingsbury Water Park. Country parks, the canal network, promoted walks and cycle routes on quiet country lanes will be an important part of the product. This group will be one of the lowest spending segments although could spend in rural pubs and village and farm shops.

d) Eating out

Eating out, while an activity undertaken by a number of groups (e.g. general day visitors, shoppers) will also be a primary trip reason for some groups – e.g. Sunday lunch, gastro-pub, evening in a restaurant.

e) Festivals, events and theatre productions

Visitor characteristics and levels of spend / additionality will vary according to events. Some will have quite local appeal – others will be capable of attracting from a wide area.

f) Sports

Sports visitors fall into two categories – participants (like golfers, anglers) and spectators (for e.g. Warwick Racecourse). Compared to other day visitor segments this group is likely to be relatively low volume but in some cases quite high spend.

3. Day from holiday base (Overseas and UK)

The Stratford visitor survey suggests this is potentially quite a sizable segment. This group are staying outside Warwickshire but travelling in for a day (or part of a day) from their holiday base.

The market will be both overseas and UK. Overseas markets are more likely to be travelling by coach, probably travelling further (as part of a wider itinerary) – the Shakespeare attractions will be a major motivator. Their length of stay may be quite short. This segment will also include overseas school and youth groups coming to Stratford-upon-Avon or Warwick Castle for the day.

UK markets are likely to be staying in surrounding destinations (e.g. Birmingham, Cotswolds) – they will be motivated by visits to destinations / towns – Stratford-upon-Avon, Royal Leamington Spa, Warwick and/or specific attractions e.g. Warwick Castle. Length of stay is likely to be longer. They will share characteristics with UK staying visitors but may comprise more families – particularly for certain attraction visits.

4. Business tourism

a) Conferences and Business Events

Business trips where there is a degree of choice around the venue or destination – this will be mainly conference business. Business exhibitions e.g. at the NEC, Ricoh Arena and Stoneleigh Park also generate some overnight stays in Warwickshire, with individual hotels having some incentive business

Warwickshire does not have any major conference centres that will attract large conferences that will generate demand for a range of nearby hotels and accommodation businesses. Conference business is typically midweek and out of the peak summer season thus complementing leisure business.

b) Conference delegates and exhibition visitors

Delegates attending meetings and conferences and people visiting business exhibitions e.g. at Stoneleigh Park for the day. In addition, Warwickshire attracts some demand from conferences held in Birmingham or Coventry for social programmes and evening functions.

5. Visiting friends and relatives (VFR)

The visiting friends market tends to be younger and more discretionary (and more active / higher spending) – visiting relatives, older and less discretionary. This market will also include family events –anniversaries, birthdays, weddings, etc.

ANNEX FOUR: PRODUCT INVENTORY

Product Inventory

Accommodation

	Stratford Upon Avon	Warwick	Total for Warwickshire
Number of serviced properties	165	94	373
Number of Non serviced properties	116	14	168
Number of Self catering	105	13	134
Number of bed and breakfasts	40	8	85
Number of Inns	13	12	32
Number of hotels	38	31	118
Number of Guest Houses	60	32	92
Number of campsites/caravans	5	3	20
Number of Farmhouses	12	7	39
Number of narrowboats/cruise boats moored	4	1	11
Number of group accommodation/Hostels	2	0	3
Number of motels	0	1	2