



Building a Vision for Tourism in Oxford

Report of the Tourism Management Review Group
Commissioned by Oxford City Council's Scrutiny Committee

May 2019

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Foreword by the Chair



During our work on this review, we heard a couple of people ask: do we really want tourists in Oxford? This report starts with an emphatic answer to that question: Yes. We believe that we are privileged to live in a beautiful and historic city, and we want to share its treasures with all our friends, neighbours and visitors from across the world, the UK, and, crucially, people who already live here. Our city belongs to everyone.

Tourism has many strengths in Oxford. The sector accounts for 12 in every 100 jobs, and brings an estimated £873 million into the local economy each year. At the same time, there are challenges. Loyalty and return visit rates are lower than comparable cities. The average stay in Oxford is just 90 minutes

for those visitors that are part of a tour operator day visit. More importantly, the people of Oxford can see the problems for themselves in their day-to-day lives: coach drop-off arrangements are inadequate and dangerous, and large groups of visitors on foot don't move easily around Oxford's attractions, often blocking our narrow streets and pavements. The visitor offer needs to work better for everyone.

A number of key strands emerged through our review. One is coordination between stakeholders. Another is that our recommendations focus both on immediate needs and, crucially, also need to be factored into a longer-term strategic vision for our city, including major developments, transport planning and other policy areas. Too often this has not been done. A third is the vital role of a well-supported Destination Management Organisation. We need a vision for Oxford.

We have been lucky enough to hear detailed, expert and passionate input from a wide range of contributors, including representatives from other cities. It has been fascinating to note areas of similarity and difference, and to see destination management models which work well elsewhere. Each historic city is unique, and no one model fits all. But there are areas in common: medieval streets built around rivers are (perhaps unsurprisingly) not well set up for mass modern tourism, and need imaginative solutions to cope with it; at the same time, they offer the finest stage-sets in the world for a wide range of rich cultural experience. Properly managed, Oxford can offer so much more.

Clearly, as a report of Oxford City Council's Scrutiny Committee, this report can only make substantive recommendations to our own City Executive Board. Equally clearly, we have to reach wider than that to make any impact. Our partners will come with us if they are offered a genuine vision and shown proper leadership. Unusually, this report is not just asking the council to spend money: we firmly believe that by encouraging people to stay longer, enjoy themselves a bit more, and, frankly, spend a bit more money, we can boost, enhance and support the vitality and appearance of our city.

This has been an extremely enjoyable piece of work. I would like to thank my fellow review group members, our excellent officers and all who have contributed in person and in writing, both in Oxford and further afield. We have clearly touched a nerve. People care passionately about our city and want it to work better, look better, and offer everyone who comes here a better experience. That is what this report attempts to do.

Councillor Andrew Gant, Chair of the Tourism Management Review Group

Chapter 1: Introduction

1. Oxford City Council's Scrutiny Committee established the Tourism Management Review Group to carry out a review of Oxford's visitor welcome, and the current approach to tourism management. The Group has gathered a wide range of evidence and engaged with numerous stakeholders in public to build local consensus on key issues concerning tourism.
2. This report is intended to provide a considered and independent opinion on what the Council and its partners could do to improve tourism management in the City. The report sets out the work undertaken by the Review Group, together with their conclusions and recommendations to the Council's main decision making body, the City Executive Board. Each recommendation is supported by a narrative based on the discussions of the Review Group at each of its meetings.
3. The Tourism Management Review Group has a cross-party membership comprising the following City Councillors:
 - Councillor Andrew Gant (Chair)
 - Councillor Pat Kennedy
 - Councillor James Fry
 - Councillor Alex Donnelly
 - Councillor Paul Harris
 - Councillor Dick Wolff
4. This report will be presented to the Council's Scrutiny Committee for endorsement on 15 May 2019, and subsequently to the City Executive Board on 29 May 2019 for decision.
5. The Review Group would like to place on record its thanks to all of the people who contributed to the review, which has enabled the recommendations in the report to be made. The City is fortunate to have a wealth and diversity of people, businesses and voluntary organisations that have a passion for helping to shape local decision making. Particular thanks go to Matt Peachey, Economic Development Manager, and Laurie-Jane Taylor, City Centre Manager, for their role in supporting the Review Group throughout its work, as well as our Scrutiny Officer, Stefan Robinson.

Chapter 2: Methodology

6. The Review Group's work involved a total of 7 meetings which were held between February and May 2019. Minutes for each of the public meetings can be found on the [Council's website](#). The Group used a detailed report provided by the Council's Economic Development Manager as the starting point for its investigations, which subsequent discussions were built around. A number of additional documents and a background reading list were also provided. Key themes and questions the Review Group sought to explore included:

- Is there a clear vision for tourism in Oxford, and are partners aware of it?
- How might the Council and its partners support private organisations to innovate?
- What destination management model is best suited to Oxford?
- What are the risks and benefits associated with the current and predicted number of visitors, particularly during peak season?
- What are partners' plans to manage rising numbers of visitors?
- What are other cities doing to promote and manage tourism that Oxford is not doing already, and what lessons can be learnt?
- How are tourism management activities funded and resourced?
- What work is planned to improve the public realm?

7. The Review Group's findings and recommendations have been informed by evidence provided by 27 external guests and Council officers, as well as a number of written internal and external reports. Contributors to the review included:

- Councillor Keith Aspden, Deputy Leader of City of York Council
- Councillor Rosy Moore, Cabinet Member for Environmental Services at Cambridge City Council
- Dr Kate Mingjie Ji, Oxford School of Hospitality Management
- Dr Rebecca Hawkins, Responsible Hospitality Partnership (RHP) Ltd
- Emma Thornton, CEO Visit Cambridge and Beyond
- Felicity Lewington, Oxford Guild of Tour Guides
- Hayley Beer-Gamage, Experience Oxfordshire Chief Executive
- Helen Camuñas-Lopez, Christ Church College Visitor Manager
- Ian Sandison, CEO Cambridge Business Improvement District
- Jack Creeber, Oxfordshire County Council Interim Parking Manager
- Jeremy Mogford, Mogford Hotels and Restaurants
- Joanna Simons, Chair of Experience Oxfordshire Board
- Juliet Blackburn, Chair of the Oxford Civic Society Transport Group
- Laurie-Jane Taylor, City Centre Manager, Oxford City Council
- Lucy Scott, North Oxford Resident

- Mark Blandford-Baker, Magdalen College Home Bursar
- Martin Kraftl, Oxfordshire County Council Principal Transport Planner
- Matt Peachey, Economic Development Manager, Oxford City Council
- Mike Naworynsky OBE, Chair of Conference Oxford
- Phil Southall, Oxford Bus Company
- Rachael Farrington, VisitBritain Senior Policy and Public Affairs Executive
- Reverend William Lamb, University Church of St Mary the Virgin
- Rob Hough, Oxford Tube Operations Manager
- Robert Smith, North Oxford Resident
- Steve Robertson, Visit Cambridge Board Director
- Tim Jenkins, VisitBritain Policy and Public Affairs Manager
- Tim Wiseman, Waterways Coordinator, Oxford City Council
- Tony Hart, Smart Oxford Programme Manager
- Tony Joyce, Oxford Civic Society
- Yvonne O'Donnell, Environmental Health Manager Cambridge City Council

Chapter 3: Background

Oxford's Tourism Offer

8. Oxford is fortunate to have a standout visitor offer on the international stage. The City welcomes an estimated 8 million visitors each year, creating significant economic and cultural benefits, alongside associated demands and costs.
9. Oxford's history and academic pedigree shapes its global brand. In addition to the colleges and grounds of the University of Oxford and circa 1,500 listed buildings dating from the 11th century onwards, the City has numerous cultural attractions with a significant concentration of them in the city centre such as: the Ashmolean Museum, Pitt Rivers Museum, Museum of Natural History, Weston Library, Martyrs' Memorial, Radcliffe Square and Oxford Castle and Prison together with the Sheldonian Theatre, The New Theatre and Oxford Playhouse.
10. A range of events are held throughout the year with a range of walking and bus tours all year round. Oxford's literary history and attractiveness as a filming location add to the diversity of the offer, as does the new Westgate Shopping Centre.
11. Oxford's offer is beyond that of most cities its size, but it also competes with other destinations including Bath, Cambridge and Stratford-Upon-Avon; all of which may be visited as part of long haul coach day trips from London. Oxford is easy to reach from London and Birmingham and is an ideal point from which to explore other regional attractions such as Blenheim Palace, Bicester Village and the Cotswolds.

The Economic Impact of Tourism in Oxford

12. In 2017, Experience Oxfordshire, as the official destination management organisation for the County, published an economic impact assessment of tourism in Oxford. This section of the report provides a brief overview of the report's findings. Domestic and international tourism in Oxford has continued to grow with the value of visitor expenditure contributing £873 million to the local economy. There is a clear distinction that overnight visitors contribute significantly more to the local economy than day visitors. Figure 1 below provides a comparison between the local spend of overnight and day visitors.

Figure 1: Comparison of overnight and day visitor economic contribution (2017)		
	Overnight trips	Day trips
Total Trips	1.2 million (4.7 million nights)	6.4 million
Total Spend	£406 million	£277 million

13. The data shows firstly that on average, visitors for one or more nights spend on average £338 over the course of their trip (£406m of spend / 1.2m staying visits). Conversely, a day trip on average generates only £43 for the local economy (£277m of spend / 6.4m day trips). This equates to a spending ratio per visit of almost 8:1 for overnight visitors and day trippers respectively.
14. Figure two below shows a comparison between the economic contribution of overseas and domestic UK visitors who stay overnight.

Figure 2: Comparison of overseas and domestic overnight data (2017)		
	Overseas trips	Domestic trips
Total Trips	526,000	640,000
Total Spend	£277 million	£128 million
Average nights	6.1 nights	2.3 nights

15. This data shows that whilst a similar number of domestic and overseas visitors come to Oxford, overseas visitors on average stay nearly three times longer, and spend more than double that of visitors from within the UK. A more recent assessment from Experience Oxfordshire shows that whilst overseas visitors only account for 11% of the visitors to the City, they contribute 40% of the overall visitor spend. From an economic perspective, the data overwhelmingly indicates that overseas visitors that stay overnight are by far the biggest contributors to the local economy per capita.

Key Data

- *Spend by visitors supports 15,000 jobs in the city (12% of all jobs)*
- *Overseas visits to Oxford have increased 25% since 2012*
- *Visitor satisfaction was 39%, compared to the average of 48% for other UK cities*
- *A rise in day trip visits is outpacing overnight visit increases*
- *Top spending activities: 28 % shopping, 24% consumables, 20% accommodation*
- *2614 overnight rooms available, with an additional 600 having planning permission*
- *The main overseas markets are USA, France and Germany*
- *China and Poland are the fastest growing visitor markets to Oxford*

Visitor Perception and Profile

16. Drawing on several surveys,¹ there is a wealth of data available that helps situate Oxford's visitor experience and tourism offer in a wider context. These should be considered indicative however, rather than clear-cut, as there is often a lag in the data and broad assumptions used.
17. In 2018, VisitEngland commissioned the production of several destination summary reports, drawing on the findings from continuous tracking data, for all destinations where sample sizes were sufficiently robust. The sample base for the study was UK holiday takers – those who have taken a break in the past 12 months or are expecting to in the next 12 months. The data below in Figure 3 shows loyalty, satisfaction and perceptions of Oxford:

¹ GB Tourism Survey (domestic overnight trips), International Passenger Survey, GB Day Visitor Survey and 2018 VisitEngland destination summary report.

Figure 3: Domestic Visitor Satisfaction and Loyalty to Oxford			
Loyalty Ladder	Oxford average	City/Large towns average	UK destination average
Loyal	13%	18%	17%
Considerers	51%	49%	48%
Rejecters	29%	24%	25%
Satisfaction	39%	48%	49%
Revisit chance	7.9%	8.4%	8.4%

18. The data shows that people are less likely to return to Oxford than most other city destinations, and their satisfaction is significantly lower on average than experienced elsewhere in the UK. The results suggest that Oxford may become increasingly uncompetitive in the regional market, if efforts are not made to improve the visitor experience, which may have knock on effects for the visitor economy in the medium term. As a 2014 Council report highlights:

The quality of the visitor experience is likely to become a more important factor in travel choices as more options become available and competition between destinations increases.²

19. Cambridge has a similar level of visitor satisfaction to Oxford, and Bath is significantly more successful in all of the survey indicators. Feedback from guests in the Review Group's work suggests that congestion, the condition of public toilets, homelessness, a density of souvenir shops and a lack of open spaces may all contribute to lower than expected visitor satisfaction.

A notable difference between Oxford and other cities is that visitors to Oxford leave with a lower level of satisfaction and likelihood to revisit... In terms of destination appeal, Oxford is fairly standard... The reason for this may be that visitors get a different experience to what they were expecting.

Visit Britain, Oxford Destination Report 2015

20. As part of the International Passenger Survey, which identified 15 destination attributes to measure the performance of destinations, no measures (including the history and heritage of Oxford) were rated significantly higher than the average for all cities. The following destination attributes for Oxford were rated significantly lower than the average for all cities:

- The ease of getting around the destination
- Being welcoming and friendly
- The ease of getting to the destination
- Its overall value for money
- The shopping opportunities (pre Westgate redevelopment)

² Oxford City Council. 2014. Sustainable Tourism. Available at:
https://www.oxford.gov.uk/download/downloads/id/2629/74_sustainable_tourism.pdf

21. Oxford was the 8th most visited city in the UK for inbound tourism in 2017 for overnight stays, having moved down from 7th in 2016. Based on our analysis of data from VisitBritain, Oxford is the only city in the top 10 to have moved down in terms of overnight visitor numbers between 2016 and 2017, having been overtaken by Bristol. Experience Oxfordshire advised that they had significantly increased their investment into their Destination management Organisation and international activity over the past five years.
22. When considering day trips alone however, Oxford ranks as the 4th most popular destination to visit for all visitors after London, Windsor and Brighton, demonstrating the stark preference for short terms visits.³ Accordingly, whilst the overall spend and number of visits to Oxfordshire as a whole continues to increase, the number of overnight stays has remained relatively static since 2002.⁴ With the UKs most frequent inter-city bus service operating between London and Oxford, and train journeys taking under an hour, the effective transport network is no doubt a key factor in driving up day visits.
23. 25% of day trip visitors to Oxford arrive as part of a package tour, and 38% of all day trip visitors arrive in July, August and September, demonstrating the significant seasonality in visits.³ Visit Britain has developed a summary profile for those who visit Oxford:

Overseas visitors who take day trips to Oxford / Oxfordshire are more likely as a whole to be female, arriving in the UK on a coach or on foot (mainly rail), on a short break of 1-3 nights, from France, visiting in the off-peak October to March period and be on a packaged trip.³

³Visit Britain, 2016. Summary insights on overseas visitors to the UK. Available at: https://www.visitbritain.org/sites/default/files/vb-corporate/uk_day_visits_report_for_visitbritain.pdf

⁴ Visit Britain, 2019. Inbound, nation, region and county data. Available at <https://www.visitbritain.org/nation-region-county-data>

Chapter 4: Findings and Recommendations

Part 1: A vision for Oxford

Welcoming visitors

24. Throughout the review process, councillors heard from key partners including Oxford University and Oxfordshire County Council that there is no strategic vision from the City Council when it comes to tourism management; a perspective with which the Review Group agrees. Contributors said that in recent years, the Council had not given a clear indication of its views around coach management, the visitor experience and the types of visitors it wished to attract. There was a sense that tourism was happening to the City, rather than being managed effectively for the benefit of residents and visitors.
25. Councillors were asked by the County Council “Does the City want to encourage visitors and tourists to come to the City?” The Review Group are clear that the answer to this question should be yes, and that the perception of the City Council being passive in these matters needs to change.
26. For this to be clear there needs to be a long term vision for tourism in Oxford that partners can sign up to. This would provide a framework which future decisions relating to destination management and the visitor experience can be guided, coming at a crucial time when much of Oxford’s key transport infrastructure is under review or redevelopment.
27. The Review Group heard that tourism in Oxford can be characterised as a problem to be fixed, often because some of the nuisance issues (e.g. coach parking and pavement crowding) are more visible than the cultural and economic benefits. The Review Group is confident that the development of a vision for tourism in Oxford, with an associated action plan, will help harness the benefits of tourism, and mitigate conflicts.
28. A primary example of where the City Council should have a more strategic role relates to the provision of appropriate facilities for tourist coaches and their drivers. The Review Group heard from members of the public and partner organisations that the drop off and layover facilities for coaches are inadequate. The County Council challenged the Review Group to take a more active role in planning for future coach park provision. Recommendation 7 discusses the need for appropriate coach drop off and layover facilities in more detail.

A much more strategic view is needed... Before thought is given to the detail of coach management, the City needs to have a joined up perspective on what its ambition and vision is for tourism, and the transport planning can follow that vision.
Oxfordshire County Council, Transport Planner

Oxford University and its colleges are keen to encourage international visits in line with its worldwide reputation
Chair of Conference Oxford

Overnight visits and day trips

29. Oxford was the 8th most visited city overnight in the UK in 2017, but the 4th most popular for day visits.⁵ This demonstrates how visitors generally favour Oxford as a day trip destination, which the Review Group heard is principally linked to its proximity to London and good transport links. Experience Oxfordshire told councillors that there are also legacy perceptions of Oxford as an expensive overnight destination. However, this is slowly changing with the increasing supply of more hotel rooms each year. Unlike other regions in the country, there was a minor decrease in staying nights of 1% in Oxford in 2017, although an increase in overall visitor spend was experienced.
30. One view that was championed almost unanimously by guest contributors to the review was the notion of increasing overnight stays, given that the average spend in the City of an overnight visitor for one night was £151, compared with £45 of a day visitor. Moreover, most overnight visitors stay more than one night, and the average spend per visitor over the course of their trip is £338; a spend ratio of nearly 8:1 in favour of overnight visitors. This goes a long way in supporting local businesses and the wider economy.
31. Whilst noting that the local economic benefits are largely weighted towards overnight visitors, the Review Group does not wish to discourage day visitors, which was otherwise the view of some contributors. As is Experience Oxfordshire's approach, the Review Group believes that overnight visitors should be recognised as the Council's preference, and this should form part of the overall vision for the City.
32. The Review Group and guests noted that day visitors that arrive as part of a tour operator group do not have sufficient time to visit more than a limited number of attractions, and this can result in them rushing between them, often led by their own tour guide. Concerns were raised about whether visitors had a truly valuable and enjoyable experience when moving at pace through the various heritage attractions in the City.
33. It is expected that the high pace of day trip package tours may leave visitors feeling less satisfied than they otherwise would be if they had stayed overnight. Accordingly, as well as the economic benefits of favouring overnight visits, the Review Group feel that a two day stay would lead to a more enjoyable experience of the City. Experience Oxfordshire and its partners are currently working to promote overnight trips through its two day visitor pass offer (The Oxford Pass), which is discussed in more detail in part 4 of this report.

The Council needs to take a strategic view on increasing overnight stays which would be to the benefit of local businesses.

University Church of St Mary the Virgin

The Council needs to distinguish which types of visitors it wants to encourage.

Managing Director, Responsible Hospitality Partnership

⁵Visit Britain, 2016. Summary insights on overseas visitors to the UK. Available at: https://www.visitbritain.org/sites/default/files/vb-corporate/uk_day_visits_report_for_visitbritain.pdf

Oxford as a Tourism Gateway

34. The national landscape for destination management organisations, and Central Government's perspective of tourism, is very much geared towards better partnership and cross-boundary working. The Review Group heard from VisitBritain that Oxford is ideally situated as a gateway to exploring other areas, and the City should not be considered a standalone destination in its own right, given that there are wider attractions that have global brand recognition including Bicester Village, Blenheim Palace and the Cotswolds within a short distance.
35. Other external guests such as Dr Hawkins said that a more holistic view of the visitor economy as a whole should be taken, and that an Oxford-centric view should be avoided in this context. The Review Group believes that through marketing itself as a gateway to other areas, Oxford could increase its overnight visitors and passing trade. This can only be done effectively however with a coordinated approach between partners. The forthcoming railway station development may be an ideal opportunity to ensure that Oxford is regarded as a hub and travel gateway for visitors in the UK.

Recommendation 1: That the Council convenes with key partners (e.g. the universities and Experience Oxfordshire) to develop a shared vision for tourism in Oxford. This should also recognise the needs and wishes of residents, and be made public and promoted through the Council's media channels. Key principles of the vision should situate Oxford as:

- a) A city that welcomes all visitors (local, national and international)**
- b) A city that aspires to have high quality, low carbon, transport facilities**
- c) A destination which is best experienced through an overnight stay**
- d) A gateway to other tourism destinations in the region**

The Tourism Sector Deal

36. In November 2018 the Government announced they will be entering into an official negotiation with the tourism industry for a tourism sector deal, to help drive productivity, boost skills, recruitment and retention and deliver "tourism zones". The initial bid to Government was facilitated by VisitBritain, and it is currently awaiting sign off. This deal will recognise the tourism sector as one of the major contributors to the UK economy, and highlight that the industry is worth investing in and growing. There are four priorities for the Deal:
- A 10-year tourism and hospitality skills campaign to boost recruitment, skills and long-term careers providing the industry with the workforce it needs;
 - Boosting productivity by extending the tourism season year-round and increasing global market share in the business visits and events sector;
 - Improve connections to increase inbound visits from more markets by 2030 by making it easier for overseas and domestic visitors to not only travel to the UK but explore more of it;
 - Creating 'tourism zones' to build quality tourism products that meet visitor's needs and expectations and extending the tourism season.

Tourism is an economic powerhouse, a growing industry with huge potential to scale-up productivity... Securing this deal will be a game-changer for the industry.
Steve Ridgway CBE, British Tourist Authority Chair

37. The Review Group heard that the process of becoming an official tourism zone, which could lever in Central Government investment for Oxfordshire and the wider area, will be highly competitive. Conversations are already underway between partners to ensure the County is ready to react to the Deal. The Government has set out what it expects from areas bidding to become official tourism zones:
- Partnership and collaboration is crucial: we expect bids to be delivered by teams combining the public and private sectors, including businesses, Destination Management Organisations (DMOs) and Local Enterprise Partnerships (LEPs).
 - Tourism Zones must be built around pre-existing transport hubs such as train stations.
 - Potential Tourism Zones must clearly be able to demonstrate that tourism is a dominant part of the local economy.⁶
38. The Review Group believes that Oxfordshire is well placed to deliver against these criteria, as do partners, representing a significant opportunity for the area. VisitBritain and Experience Oxfordshire both highlighted that a successful bid to become a tourism zone would require a well-coordinated and well-resourced approach. It was emphasised that Central Government will be looking for proven leadership and collaboration between local stakeholders in this process, and the Council must play its part in supporting this.
39. Oxford City Council currently has a seat on the boards of the Oxfordshire Local Enterprise Partnership (OxLEP) and Experience Oxfordshire, who are understood to be leading on preparations for the Tourism Sector Deal. The OxLEP Culture and Visitor Economy Sub-group would be an ideal space to drive preparations, as the Deal is explicitly within the Sub-group's terms of reference. However, there has been no mention of it in recent published minutes.
40. The Council is therefore recommended to take an active role through its membership with OxLEP and Experience Oxfordshire to ensure that the County is in a strong position to respond to opportunities arising from the Sector Deal. For example, the prospect of becoming an official Tourism Zone.

Recommendation 2: That the Council, through its membership on the Boards of Experience Oxfordshire and OxLEP, actively supports local efforts to prepare for the Tourism Sector Deal (such as bidding to become an official Tourism Zone), which would lever in investment to extend the tourism season and improve transport access for visitors to the City.

⁶ VisitBritain. 2017. Tourism Sector Deal. available at: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/industrial_strategy_-_sector_deal_bid_submission.pdf

Destination Management and Experience Oxfordshire

41. Experience Oxfordshire has been the official destination management organisation (DMO) for the County since 2011. The organisation was given a ten year lease for City Council owned premises on Broad Street which houses the Visitor Centre, at a cost of £85,000 per year, which increased to £95,000 following a review in 2016. The Council paid the rent by awarding an annual grant to Experience Oxfordshire. The total grant contribution budgeted for in 2018/19 was £173,000, made up of the £95,000 rent reimbursement plus a £78,000 service grant, which has been decreasing 10% year on year since the start of the arrangement. At the February 2019 Budget meeting, the Council agreed to reduce the service grant over the next two years to taper off support to zero.
42. The Review Group met with Experience Oxfordshire twice to discuss various issues, and their Chief Executive, Hayley Beer-Gamage, attended all of the group's public evidence gathering sessions. Early in the review, councillors received a presentation which set out the role and purpose of the DMO, and its ongoing work. Key aspects highlighted in the presentation included:
- There were no successful destination management organisations in the UK which did not receive some level of public sector funding.
 - Only one in six people transact at the visitor centre, but 500,000 visitors were supported by the centre each year. The centre also supports a wide range of local businesses through the provision of low cost ticket sales.
 - Prior to the establishment of Experience Oxfordshire, there were a number of challenges for the City; a declining visitor economy, demand exceeding supply for overnight stay accommodation, perceptions of being expensive and unaffordable and a lack of access to key academic institutions.
 - No two models of destination management are the same. Each area has its own unique approach, and there is not a 'one size fits all' model.
43. The Review Group heard from a number of external partners including the Chair of Conference Oxford and the Managing Director of Oxford Bus Company that they were disappointed with the Council's decision to phase out the Experience Oxfordshire grant. When asked how the DMO would deal with the reduction in funding, it was explained that the level of funding reduction from the Council was not anticipated at this point in time and it may stop certain streams of work from being delivered. The Chief Executive of Experience Oxfordshire said that the Council could expect a significant return on its investment, and there were several examples cited of how the DMO's interventions had secured high value international visitor contracts that benefited multiple businesses and stakeholders.

Those who are disappointed with Oxford are both unlikely to recommend it and also unlikely to convert into loyal visitors. This places the already under-funded DMO on a cycle of having to continually invest in high spend activities to attract new rather than returning customers as well as limiting the potential to build on social media reviews.

Dr Rebecca Hawkins, RHP Ltd

44. Annual funding to the DMO is currently also received from the County Council and Cherwell District Council, as well as a number of investors from the private sector that form Ambassador partners of the organisation. The County's contribution is £25,000, and Experience Oxfordshire employs 30 members of staff (14 full time equivalent posts). There are also a large number of private sector partners paying for a range of marketing, PR and business support services which is their main motivation for joining the organisation. The majority of partners are buying partner services that do not relate to performing more destination management focussed services.
45. The Review Group heard that Experience Oxfordshire operates on an international scale, engaging with overseas contractors and businesses and fielding a wealth of media enquiries. For example, it is working with Birmingham Airport and airlines to promote visits to the area, and also Trip Advisor to help build online content to inform visitor itineraries. The Chief Executive of Experience Oxfordshire highlighted that a recent recommendation from the Council's Budget Review Group asked the Council to seek out these types of opportunities, which the DMO was already undertaking.
46. Frequently and consistently, the Review Group heard that in order for tourism to be managed effectively to the benefit of residents and visitors, there needed to be well-resourced and funded DMO leading this work. This applies both in terms of supporting a thriving local economy and tourism sector, but also the experience, look and feel of the City. The return on investment, and opportunities for 'invest to save' initiatives, was explained to be substantial in relation to DMO funding. When asked to come to a view on what the priorities for the Review Group should be, representatives from VisitBritain said the focus should be on working effectively with Experience Oxfordshire and ensuring there was adequate support for them.
47. Within the national landscape, the Review Group heard that many regional DMOs are experiencing financial challenges and shortfalls. As seen with public services, tourism funding has declined 53% since 2010.⁷ The former Chair of the Tourism Society recently explained:

Local tourism agencies will need to look at ways to outsource, collaborate and use "smarter working" in order to survive... DMOs can no longer rely on traditional sources of long-term funding or traditional models of operation and will have to look at new operating and funding models going forward.⁷

48. The Review Group believes the Council has a role to play in supporting this process. A 2015 Government Review into tourism in the UK received contributions from the Tourism Alliance. They said:

[The Alliance] strongly believes that the sub-national tourism structure in England is effectively broken and that this will increasingly affect regional tourism economies. It will also adversely impact on the success of the Government's Tourism Policy, which is predicated on there being a strong, effective DMO network throughout England.⁸

⁷ Walker, Tom. 2018. Go To Places CEO warns of 'uncertain future' for regional tourism funding. Available at: <http://www.leisureopportunities.co.uk/news/Go-To-Places-CEO-warns-of-uncertain-future-for-regional-tourism-funding/339978>

⁸ House of Commons Library. 2015. Promoting Tourism. Available at: <https://publications.parliament.uk/pa/cm201415/cmselect/cmcmds/614/61405.htm#a3>

49. By the end of the review, councillors noted that the full extent of the work undertaken by Experience Oxfordshire was not commonly understood, and the scope and scale of their work was wider than expected. Councillors noted that a case could be made for the Council continuing to fund Experience Oxfordshire, but this was couched against recognition that the Council has other budgetary pressures and priorities that need to be managed.

50. Tourism remains a non-statutory responsibility, and destination management is not a function explicitly for local authorities to fund or resource. However, there is an important role for the Council to play in working with partners to ensure Oxford has an attractive visitor offer. Independent experts and local government commentators agree, explaining:

Casting the spotlight on DMOs and LEPs diverts attention away from the pivotal position that local authorities have occupied – and likely will continue to occupy in the future – in the mediation of tourism development. Local authorities are often major actors and (financial) contributors to DMOs.... How tourism is viewed, valued and resourced within local authorities will therefore be a major factor in future tourism development (p.21).⁹

For cash strapped councils where no investment can be made, it might be possible to encourage and promote alternative models of support, or maximise capacity through partnership with others (p.4).¹⁰

51. Going forward, the Review Group believes it is essential that there is a sustainable and well-resourced DMO for the County, and that the Council should have a pivotal role in driving this forward. However, so should other institutions including the universities, local businesses and neighbouring councils. A visit by the Review Group to Cambridge found a similar perspective, in that all key partners who sought to benefit from tourism were expected to take an active role in supporting their DMO.

52. The Review Group wishes for the City Executive Board to review the process and assessment undertaken which led to the decision to phase out funding to Experience Oxfordshire. There is concern that this budget reduction will have knock on effect for Oxford's visitor economy, and that the decision may be untimely in light of any forthcoming Tourism Sector Deal and the low level of visitor satisfaction currently being experienced. It is also recognised however that in the context of local government funding constraints, the Council increasingly has to take difficult decisions about how to focus its finite resources.

53. Councillors agree that this work would be most effectively taken forward through political leadership from the Board Member with portfolio responsibility for tourism, with the support of officers. Accordingly, the Review Group also recommends that the Council's appointment to Experience Oxfordshire's Board should be a member of the City

⁹ Dinan, Hutchinson and Coles. 2011. The Changing Landscape of Public Sector Support for Tourism in England. Available at:

https://www.exeter.ac.uk/media/universityofexeter/centreforsportleisureandtourism/pdf/Changing_Landscape_Report_for_VisitEngland.pdf

¹⁰ LGiU. 2014. Local Authorities and Tourism. Available at: <https://www.lgiu.org.uk/wp-content/uploads/2014/11/Local-authorities-and-tourism.pdf>

Executive Board going forward (currently it is the Head of Community Services). Consideration should also be given to whether the Board Member's title can change to better reflect their remit for tourism matters.

Recommendation 3: That the City Executive Board reviews the process and assessment undertaken which led to the proposal to phase out funding to Experience Oxfordshire, and undertakes to work with partners to jointly ensure there is a suitable and sustainable funding model for destination management in the future.

Recommendation 4: That the Board member for Culture and City Centre becomes the Council's representative on the Board of Experience Oxfordshire, and consideration is given to how their portfolio title can better reflect their remit for tourism matters.

A named officer for tourism matters

54. In line with the need to have a vision for tourism in the City, and the increasing need for partnership working in the sector, the Review Group came to the view that the Council should have a single point of contact responsible for tourism matters. This does not necessarily mean establishing a new officer post, but rather being clear about who is the Council's lead contact for partners on the issue. Guests to the review suggested that there is no clear contact for these matters.
55. This person could be the lead officer to work with the Board Member and partners to develop a suitable and sustainable funding model for destination management in the City, as set out in recommendation 3. Through the review, it was found that there was no dedicated officer for tourism matters, and that it overlapped with events, city centre management and economic development roles. It is understood that the Council previously had a dedicated tourism officer and tourism team up until 2011 when the services were outsourced to Experience Oxfordshire.

Recommendation 5: That the Council has a named officer or team to be recognised as the lead on tourism matters.

The Oxford Living Wage

56. 11 years ago Oxford City Council adopted the Oxford Living Wage (OLW). This came to be set at 95% of the London Living Wage. In 2017, the Scrutiny Committee decided to review this policy and set out to engage with key partners and review its own employment record. In April 2018, following a successful scrutiny review process, the City Executive Board agreed a total of 14 recommendations. These served to strengthen and build on the Council's existing work in promoting the OLW.
57. It was noted that whilst significant efforts are underway nationally to promote the tourism and hospitality sector as an attractive career, many still consider this to be a low wage sector. Accordingly, the Council should do what it can through existing commitments to

promote the OLW and encourage employers to pay this wage as a minimum. The Review Group noted the Leader of the Council's intention to ask Oxford University's Colleges to pay the OLW to all their staff, and offered their support for this.

Recommendation 6: That the Council continues to encourage employers within the hospitality and tourism sectors in Oxford to pay the Oxford Living Wage, including the universities and colleges.

Part 2: Coach Management and Transport Planning

Becoming a 'Coach Friendly' City

58. The Review Group heard from residents of Oxford, and witnessed in their own experiences, how coach congestion and parking was a challenge for the City. Specifically, the Review Group noted that some tourist coaches (those which operate as part of day package tours) had been:
- Parking in residential side streets and resident bays;
 - Parking over cycle lanes;
 - Carrying out unsafe manoeuvres;
 - Idling whilst parked;
 - Unloading passengers into the road, owing to left hand drive coaches;
 - Dropping off at unsafe and inappropriate locations in the City.
59. The cumulative effect of these issues has meant that at certain times of the year, the City has become overwhelmed by coaches, particularly in light of the City's medieval infrastructure. It was recognised by guests and Councillors however that many of the nuisance issues associated with coach access was driven by a lack of adequate drop off and layover facilities for drivers.
60. It was also noted that there was a very limited evidence base concerning the number of coaches that entered the City each day, which councillors believe is crucial information required for planning for the future. In the absence of any external studies on the issue, the Review Group received a detailed proposal from a North Oxford resident, which suggested that between 190 and 260 coaches arrive in the City each day, outside of winter. Other anecdotal estimates suggest that this is a conservative figure.
61. Guests in the review explained that people visiting on package tours often arrive in Oxford as part of long haul multi-stop coach trips from London, which also visit places such as Stratford-On-Avon, Bath and the Cotswolds. Owing to regular road congestion, and the high number of stops, there was often a rush to see all the sights. Oxford is regularly the last stop on the way back to London, and this time slot tended to be squeezed, meaning passenger stays in Oxford could be less than an hour.
62. The unique selling point of these tours was that they were competitively priced, and offered visitors the opportunity to see a number of key sights in the South of England in one day. Phil Southall said that a significant number of tourists leaving London however

use the east coast railway line, to visit cities such as York and Durham. Rail links were not as favourable however between key heritage cities in the South.

63. Dr Kate Mingjie Ji, Oxford School of Hospitality Management, said many large groups entering the City by coach were part of package tours and language student groups. These groups had not been historically receptive to advice or change, given the business success they were having. They did not want to break existing relationships and timetables with current attractions in the City. Often, agents would prepare a tour several years in advance, and offer highly competitive prices.
64. The Review Group heard from Martin Kraftl, Principal Transport Planner at Oxfordshire County Council, that before the City Council gives direction on coach transport planning, it needed to answer the question of whether the City welcomed coaches, and whether it would wish to have city centre facilities. The answer, he said, had not been clear to date.
65. Many of the solutions offered to coach congestion and idling required people to shift between transport modes. For example, coaches making better use of Redbridge Park and Ride, and passengers then moving to another scheduled bus into the city centre. However, the Review Group heard that tourist coaches were often full, and any suggestion of breaking the journey and introducing transfers to other vehicles would likely reduce the viability of the service, and put some people off. This is similarly corroborated in the Oxford City Centre Movement and Public Realm Strategy 2018:

Some stakeholders suggested denying access for tourist coaches to the city centre, requiring them to set down and pick up at the park and ride sites, but this is not considered to be a practical strategy and it will be necessary to continue to allow coaches to gain access to the city centre. Tourists are an important element in the city's economy and their reasonable needs should be met (p.98).¹¹

66. This highlights that if the City does welcome coaches, which are important for mass transport and supporting the local visitor economy, it is the City that will need to adapt and make suitable provision. Coaches are a comparatively more clean form of transport than cars, and can help to reduce congestion, typically taking 20 cars off the road on average.¹² They are not however as efficient as electric modes of transport, which will no doubt have an increasing role in helping the City to improve its air quality. Furthermore, the average spend nationally by domestic coach passengers on overnight trips is 15% higher than that of other overnight visitors, contrary to common views that coach visitors are of lower economic value to destinations.¹²
67. Bath and North East Somerset Council suggest that £180,000 is spent each day in Bath by coach passengers, and spend in Oxford is likely to be higher given that it has more day visitors.¹³ The Review Group heard from Experience Oxfordshire that some overseas coach contracts have the potential to bring in spend way in excess of this.

¹¹ Phil Jones Associates. 2018. Oxford City Centre Movement and Public Realm Strategy 2018 Available at: <https://www2.oxfordshire.gov.uk/cms/sites/default/files/folders/documents/roadsandtransport/transportpoliciesandplans/areatransportstrategies/oxford/03001-FinalReport-RevC2.pdf>

¹² VisitBritain, 2018. Welcoming Coaches and Groups. Available at: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/guidance_coach_prospectus.pdf

¹³ Bath and North East Somerset Council. 2017. Coach Parking Strategy. Available at: https://www.bathnes.gov.uk/sites/default/files/coach_parking_strategy_exec_summary.pdf

68. The Review Group expressed some scepticism over the benefits of coach tours entering the City, noting that they had not received evidence from other transport industries. Principally, Councillors were unsure of the benefits from ultra-short stay tours lasting less than 90 minutes. Whilst they have the same environmental and congestion impacts as that of longer coach stays, they did not return an equivalent spend per visitor. Furthermore, coach drivers are less likely to use layover facilities if they are only in the City for an hour, meaning they will resort to parking in residential areas. It is likely that many visitors on these short stops spend very little.
69. Accordingly, in wanting to have better facilities for coaches, it is hoped that this will extend the length of stay and consequent spend of visitors. However, as set out in recommendation one concerning a Vision for the City, the Review Group's preference is always for an overnight stay, given the more immersive experience it provides and greater revenue generation locally.
70. In dealing with nuisance coach parking, the powers and resources available to carry out enforcement action are considered so limited, that it cannot be a sustainable solution. The solution must come from providing sufficient incentives to encourage drivers to use existing and new facilities, rather than seeking enforcement motivators. The Review Group discussed at length possible ways to impose sanctions or levies on coach tour operators (for both polluting and nuisance parking reasons), but it was noted that this option may not send a good message to the industry that the City welcomes coaches.
71. Experience Oxfordshire and bus and coach operators emphasised that Oxford is operating in a competitive tourism market, and that any disincentives for coaches to enter the City may result in a loss of visitors, which will have a knock on effect for the visitor economy.
72. The review built a clear consensus that the City needs to have short, medium and long term plans for improving coach drop off and layover facilities. Drop off locations need to be within close proximity to the city centre, near toilet facilities, and provide sufficient space for coach manoeuvres. Consideration should also be given to the wayfinding routes that are likely to be taken, and how the drop-off locations interact with the attractions circuit. This will help reduce footfall congestion on busy working streets.

A coach park needs to have good facilities for drivers which will incentivise them to make use of them.

Martin Kraftl, Principal Transport Planner, Oxfordshire County Council

73. Layover facilities need to be easily accessible, reasonably priced and have good facilities and services for coach drivers within the ring road. This should include food and drink (not just a vending machine), a wash room and an air conditioned waiting area. Facilities must be of a sufficient quality that they incentivise coach drivers to use them. Having great facilities will enable Oxford to win the custom of coach drivers who often have a say in the route planning of their tours. A free bus ticket into the city centre for coach drivers would also be desirable, and it should be noted that Oxford Bus Company suggested that they may be able to assist with land for this within their own depot.

74. VisitBritain explains what the Council should do to ensure there are adequate facilities for drivers and their passengers:

[Local Authorities should] make allowances for ample, secure coach parking with CCTV, coach and driver facilities, including rest rooms, coach washing and cleaning facilities and preferably all free of charge... Ensure there is a lay-by or bus stop where the coach can drop-off passengers safely and also pick-up, ideally close to public toilets and refreshment outlets (p.8).¹²

75. Research and guest contributions suggest however that the vast majority of coach operators are willing to pay to use good parking facilities for a small fee, such as £10 for a short stay. Smart pricing may also encourage longer stays, as would good facilities for drivers. The Review Group believe that good quality accessible services for coach drivers are fundamental to tackling some of the nuisance coach practices that residents have expressed concern over. This vision is already expressed briefly in the Oxford Transport Strategy, but the Review Group wishes to see a much more actionable plan in place:

With growing numbers of tourists coming to the city... more suitable and adequate arrangements to set down and pick up passengers will be required. In addition, the provision of adequate long stay off street coach parking is required (p.16).¹⁴

76. It was noted that in Cambridge and Bath, the vast majority of tour operators drop off at one single location, despite a number of other options being available. This highlights how coach drop off locations are ultimately decided at the preference of the driver. Whilst not seeking to endorse one suggestion over another, there were a number of suggestions given by guests about possible drop off locations in the City, and layover locations further out, set out below:

Figure 4: Possible drop off and layover locations suggested during the review	
Drop Off	Layover
Speedwell Street	Oxford Bus Company's Cowley depot
Gloucester Green	Oxpens industrial estate
Opposite Speedwell House	Existing park and ride facilities
Keble Road	Osney Mead
The new railway station development	

77. In terms of the long term vision for tourist coach access to the City, the Review Group believes that suitable facilities should be factored in to the master planning of the West End redevelopment process and the new railway station. This represents an ideal opportunity to plan for increasing visitor numbers in future years. It will also help to situate Oxford as a transport and visitor hub, in line with aspirations to become a tourism zone as part of the UK Tourism Sector Deal. Redbridge was suggested by guests not to be a long term option for tourist coach layover, as its proximity to the City Centre and

¹⁴ Oxfordshire County Council. Oxford Transport Strategy. Available at: http://mycouncil.oxfordshire.gov.uk/documents/s33711/Background%20CA_JUN2816R12%20Connecting%20Oxfordshire%20vol%208%20part%20i%20-%20Oxford%20Transport%20Strategy.pdf

general condition is not considered fit for this purpose in the long term. Equally, St Giles was considered a poor location for drop off. The Review Group would not wish to rule out any options however.

78. As a framework for moving towards having the right facilities in the right place, Phil Southall of Oxford Bus Company proposed that Oxford works towards becoming a 'Coach Friendly' City, in line with the seven criteria for accreditation set out by the Confederation of Passenger Transport below. He said he was not confident that Oxford could meet any of these criteria, and other guests were in agreement.



- 1) There must be evidence that the destination welcomes coaches and consults with local bodies and the industry on their strategy for integrating group tourism into local plans;
- 2) Clear directional instructions and signs for visiting coaches. This may include special measures for access to city/town centre (use of bus lanes etc.);
- 3) Adequate capacity for coach parking, drop off & pick up points which are well signposted;
- 4) Proximity of coach facilities (parking and drop off & pick up points) to visitor attractions and hotels;
- 5) Driver facilities including provision to rest and for refreshments;
- 6) Adequate facilities for group comfort (toilets, refreshments, waiting areas etc.);
- 7) A named representative at the Local Authority who can be contacted or on hand to help with questions or requirements, and provide information packs in advance.¹⁵

79. Whilst meeting the criteria will be challenging, it was noted that other similar heritage towns and cities had gained this status including Salisbury, Stratford-on-Avon and Coventry. Bath similarly has a [coach parking strategy](#) to become more coach friendly. The Review Group were in agreement that the Council needs to engage with partners to take measurable steps towards meeting these criteria. These should be supported by an appropriate action plan that can be monitored as necessary by the Board Member and the Scrutiny Committee. A similar recommendation was also made as part of the 2018 Oxford City Centre Movement and Public Realm Strategy:

¹⁵ Confederation of Passenger Transport. 2019. Coach Friendly Status Requirements. Available at: <https://www.coachfriendly.co.uk/requirements>

A more detailed study of tourist coach set down and pick up requirements should be carried out, taking into account existing and future demand, the potential for closer management and leading to the identification and outline design of suitable location (p.98).¹¹

80. Evidently, there are a number of strategic documents, studies and local commentators calling for such a plan to be developed, and this should be considered a priority outcome from this review. This is essential if Oxford is to remain competitive on the coach tour circuit in the south of England.

81. Current advice listed on the [Council's website](#) is for coaches to drop off at either St Aldates South (northbound), Beaumont Street (westbound) or St Giles' (northbound), and use Redbridge Park and Ride for layover. Having heard from guests to the review, Councillors believe that the current provision for coach drop off and layover facilities are not working sufficiently for residents, visitors or coach operators. In the short term, this advice needs to be revisited to ensure these are the best locations at present, and any changes communicated clearly to the coach industry. In the long term, a more strategic transport planning approach should be taken to ensure the City can better accommodate visitors and coaches in the future. As VisitBritain explains:

Destination Organisations and planning departments should have a coherent strategy for integrating coaches and group tourism into long term infrastructure development plans. Many councils already have plans in place to meet the requirements of the industry (p.10).¹²

Recommendation 7: That the Council, having secured support from the County Council, develops an action plan to become a 'Coach Friendly' city, with key performance indicators and milestones, in accordance with the seven criteria set out by the Confederation of Passenger Transport. This should incorporate short, medium and long term strategic infrastructure plans for improving drop off and layover facilities in the City, linking with key wayfinding routes and providing sufficient facilities for passengers and coach drivers. Key stakeholders including the bus companies and the DMO should be engaged with through this process.

Transport and Economic Strategy

82. Transport management is a function that sits within the responsibility of Oxfordshire County Council. The Oxford Transport Strategy already highlights the need for transport facilities, such as those for coaches, to be incorporated into the long term master planning of the area:

The Oxford Transport Strategy needs to capitalise on current and committed public realm improvements... [Oxford has a] public realm which is not befitting of a global tourist destination (p.5).¹⁴

83. Accordingly, City and County Councils should ensure that due weight is given to the importance of having tourist coach facilities in the planning and infrastructure development process. One contributor to the review said an opportunity to capitalise on

coach facilities and public realm improvements was missed when redeveloping the Westgate Centre. This is something that could have been explored in greater detail during the planning stage.

84. As the first challenge highlighted in London's Tourist Coach Action Plan¹⁶, planning and development departments often overlook the demands of the coach industry. This is also highlighted as the principal challenge for the industry by VisitBritain.¹² The development of new centres that increase the demand for coaches, such as conference centres, railway stations and retail centres should therefore consider how coaches will be catered for.
85. The Review Group believes therefore that the Council should take steps to raise this issue up the transport planning agenda, and give a clear steer to Oxfordshire County Council about the Council's aspiration of having coach facilities that are fit for purpose. The current Local Transport Plan 5 is an ideal opportunity to get this right.
86. In addition to local transport strategies, the Review Group believes the value of the Tourism Sector and the visitor economy is not suitably recognised in key policy documents for the City and County. Spend by visitors to the city supports 15,000 jobs (12% of all jobs), and this has the potential to grow significantly if the right resources are put into driving tourism as an economic priority. Throughout the review, tourism was pitched as an invest to save sector, and it was heard that boosting the length of stays would bring about benefits regarding the Business Rate tax base, economic productivity, increased jobs and reduced subsidy to public transport.
87. The Review Group believes the Council has an important role in ensuring that this sector receives the right recognition and level of investment in order for it to thrive. Accordingly, this should be built into the Council's and other regional policies.

Recommendation 8: That the Council makes representations to Oxfordshire County Council concerning the need to distinguish standalone transport and infrastructure plans for tourist coach access in future strategies and policy documents. Further, the Council takes an active role in raising the profile of the tourism sector within key strategic documents, such as the emerging Economic Growth Strategy and Local Transport Plan 5.

Communication with coach operators

88. VisitBritain advises that:

[Local Authorities and Destination Management Organisations] should look to raise their profile through public relations in the specialist coach and groups travel trade press. These magazines are all receptive to hearing about relevant industry news stories – special events, new openings or new initiatives (p.9).¹²

¹⁶ Transport for London. 2013. London Tourist Coach Action Plan. Available at: <http://content.tfl.gov.uk/tourist-coach-action-plan.pdf>

89. This view was similarly expressed by scheduled coach operators in the City, and there was a clear message that the City and County Council could improve its communication with the industry. It was noted however on City Council officer advice that this should principally fall within the remit of the County Council, as the Local Transport Authority. There are examples elsewhere in the UK of councils issuing travel trade guides and e-newsletters 4 times a year, for example.
90. Communication through the Confederation of Passenger Transport and the Coach Tourism Association would provide an ideal opportunity for the Council to set out its vision for the City (recommendation 1) and preferred drop-off locations and plans to improve them. It would also be an ideal platform to disseminate information concerning major roadworks, street closures and events.

Recommendation 9: That the Council reviews and updates the current drop-off and layover advice for coach operators, as set out on the Council's website, and commits to more frequent engagement with the Confederation of Passenger Transport and the Coach Tourism Association.

Coach Survey

91. A better understanding of the number of coaches that come into Oxford and where they come from would help provide a demand led approach to future development plans. For example, a detailed study undertaken in Cambridge showed that most coach companies entered the City on a monthly basis, staying no longer than a few hours. Bath and North East Somerset Council has similarly undertaken a 233 page study to assess coach access requirements. They found that:

70% [of coaches] stay for between 2 and 3 hours, with the bulk of all coaches staying between 1 and 4 hours... Overnight stays represented between 10% and 20% of the coaches travelling to Bath (p.39)... 35% of the operators who were visiting Bath that day visit the city on a daily basis, with over 60% visiting Bath at least once a week (p.67)... With approximately 50% of coaches starting and ending their journeys in London (p.68).¹⁷

There was a high instance of coaches (over 85% of the total) carrying groups made up mostly or wholly of passengers from overseas. Coaches carrying a single nationality of overseas passengers most commonly had Chinese or Japanese groups, representing 18% of the surveyed coach groups between them (p.68).¹⁷

92. The Cambridge survey similarly allowed an understanding how and why coaches drop off in certain places, and what the coach drivers do once they have dropped off their passengers. Most operators there were operating as sub-contractors for other companies. The Review Group believes that a similar study in Oxford would be hugely beneficial for transport planning purposes, through helping to identify the scale of the local coach industry, and barriers to meeting the needs of tour operators.

¹⁷ BuroHappold Engineering. 2017. Bath Coach Parking and Pick-Up/Drop-Off Strategy. Available at: https://www.bathnes.gov.uk/sites/default/files/coach_park_full_report_web.pdf

Recommendation 10: That the Council issues and resources a survey to tourist coach companies, in partnership with Experience Oxfordshire and Oxfordshire County Council, to better understand; the number of coaches that enter the City, their movements, and barriers to making best use of existing facilities. This should broadly reflect the research approach taken in Cambridge.

Part 3: Tourism Levies and Revenue Generation

An overnight bed levy

93. As one of the central themes of this review, councillors were asked to look at how the City might benefit from a tourism levy on bed spaces or public transport, for example. The Council does not currently have the power to apply a levy on paid for bed spaces in the City, as this would require new primary legislation. However, a number of local authorities have started exploring the case for levying a form of tourism tax. These include Birmingham, Brighton, Edinburgh, Cornwall and most recently Bath and North East Somerset. Indeed tourism levies already operate in a number of European cities and towns.
94. Councillors in Edinburgh have voted in favour of what could be the UK's first scheme. Their proposed Transient Visitor Levy would include a flat £2 per night room charge, applicable to all types of accommodation apart from campsites. It would only come into effect once the Scottish Parliament passes enabling legislation, and would raise an expected £14.6m each year. Birmingham is the most likely candidate to take this forward in England at present, but this will be within the context of hosting the Commonwealth Games – the levy will be targeted, hypothecated and time limited (as was the Olympic tax in London).
95. The basic principle of a tourist tax is that it provides a means to generate additional funding to improve public services and facilities offered to visitors and residents. It is recognised that visitors in Oxford may create additional pressures on services that are funded principally by residents through council tax, including street cleaning, toilet facilities and Police services. This can extend to less obvious services too including sewerage systems, utilities, waste disposal facilities, parks and recreation areas and health care facilities. International visitors are argued to make little contribution to national or local funding for these types of public goods.¹⁸
96. As an indicative figure, Bath and North East Somerset Council (as a comparable visitor destination) believe an estimated £2.4m could be raised through a £1 per night levy on bed spaces. Oxford's accommodation supply is approximately 30% greater than that in Bath, with planning permission taking the hotel room offer to 3200 in the near future. Oxford also benefits from a very high occupancy rate, with over 80% of rooms on average being used. There are approximately 7000 rooms in colleges which become

¹⁸ London Finance Commission, 2017. Options for a tourism levy for London. Available at: <https://www.london.gov.uk/sites/default/files/tourism-levy-for-london-wp83.pdf>

available during the summer months, and are quickly filled by large groups such as language schools.¹⁹

97. Whilst the benefits of a levy had driven the Review Group's interest in discussing the issue with partners and guests, a straw poll and discussions at meetings indicated mixed views on the issue. The most significant reservations were expressed by VisitBritain, who are tasked with advising Central Government on national tourism matters. Their concerns were twofold:

- a) The UK is perceived to be an expensive destination already. This is in part due to high air passenger duty and VAT costs. When coupled with an overnight levy, the cumulative costs may dissuade a small number of visitors, in an international market where the UK is already struggling to compete. In recent years, the UK's market share in international visitors has either been static or declining. Any currency fluctuations associated with Brexit were unlikely to have a significant bearing on visitor numbers because this was not a common consideration for international visitors.
- b) The UK has a difficult task in demonstrating that it is a welcoming and visitor friendly destination, in light of the Brexit vote and ongoing political discourse. The introduction of an overnight levy may have the potential to damage international perceptions of the UK's welcome; perhaps more so than the actual cost implications of an overnight fee.

98. The Cultural Cities Enquiry offer an alternative viewpoint however, suggesting that options for introducing a levy should be evaluated fully at a national level, as an alternative or additional means of capturing value for reinvestment in cultural assets and public services. They state "A UK-wide review of the merits of a tourist levy is required in order to provide greater shared understanding of the opportunities and challenges of this option for the UK" (p.18).²⁰ They recommend a national tourism levy, or a devolved power to cities to establish a levy, with income ring-fenced for cultural investment. VisitBritain said they are taking soundings from the industry, but a national review is yet to be enacted.

99. There was however a broad consensus among guests in the review; that a tourism levy would more likely be supported by local residents, hotels and the universities if it was demonstrated that its application would be fair and equal across all commercial accommodation providers (e.g. Hotels, Bed and Breakfasts, Airbnb and colleges when operating in a solely commercial capacity) and that any such levy is targeted for reinvestment into infrastructure, services and facilities that improve the visitor experience, and mitigate any challenges. It was noted however that the introduction of an overnight levy would serve to tax those visitors which the City most desired in its vision for tourism, which may continue to encourage day visits only.

100. Council resolved in November 2017 to:

¹⁹ Oxford City Council. 2014. Sustainable Tourism. Available at:

https://www.oxford.gov.uk/download/downloads/id/2629/74_sustainable_tourism.pdf

²⁰ Cultural Cities Inquiry. 2019. Available at:

<https://www.corecities.com/sites/default/files/field/attachment/Cultural%20Cities%20Enquiry%20%5Bweb%5D.pdf>

Continue to build links with other tourist cities, such as Bath and the London Borough of Camden, to share best practice on tourist management and to look at a joint approach with them on the introduction of a tourist levy, which will require Parliamentary legislation.

101. Whilst the details of introducing such a scheme would be complex, the Review Group believes the principle of the motion passed previously should continue, and that the City should seek devolved power to levy an overnight charge. However, should this power be granted, a much more comprehensive review will need to be undertaken to understand the full impacts, before a decision can be taken on its implementation.
102. Councillors believe that there is sufficient evidence elsewhere (for example, Bath and Edinburgh) that there is a case for introducing a levy, and that a detailed study is not needed in Oxford prior to any legislation being passed to permit the use of a levy. The Review Group are not convinced that a nominal fee of £1 per night on a bed stay would deter people from visiting the County or City, and received no compelling evidence to suggest this would be the case.

Recommendation 11: That the Council remains involved in discussions with similar cities about the introduction of an overnight tourism levy, and supports national efforts to lobby for the ability to introduce such a levy. Any plan must capture all providers of commercial paid accommodation, not just hotels, and assurances are needed that the revenue generated will go towards improving the visitor experience. Consideration should be given to the Local Government Association's role in supporting this effort.

Congestion Charges

103. The Review Group also considered how local road charges, otherwise known as congestion charges, might be used to generate revenue for reinvestment into the visitor experience. Specific focus was given to options for generating revenue from tourist coaches that enter the City. Charging schemes may only be made "if it appears desirable for the purpose of directly or indirectly facilitating the achievement of policies in the charging authority's local transport plan."²¹
104. If minded to, the County Council could introduce a charge for certain vehicles based on their emissions rating, as has been done in London. This was a consideration as part of the Zero Emission Zone planning process, but no detailed work had been undertaken to date. However, the Review Group heard from Oxfordshire County Council representatives that this can be a very resource intensive process and requires extensive consultation. In extreme cases in Europe, cities such as Venice, Florence and Rome can charge in excess of 600 euros for coaches to enter the city.
105. The Review Group heard from Oxford Bus Company that if emissions standards were targeted through a charging scheme, most coaches would already meet high standards,

²¹ Housing of Commons Library, 2018. Local Road Charges. Available at: <https://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN01171>

and would otherwise soon upgrade their coaches. Whilst this helps fulfil the Council's clean and green objectives, it would be unlikely to generate reasonable revenue when considered against the administrative costs. Furthermore, the introduction of any charging scheme would not align with the Review Group's conclusions that Oxford should be a welcoming city for Coaches.

Part 4: Tourism Products and Events

Supporting and promoting partners

106. A central point of the Review Group's discussions with guests focussed on how digital innovations might improve the visitor experience in future years. During the review, the Oxford Pass was launched. This joint product from Experience Oxfordshire, Blenheim Palace and Oxford Bus Company allows access to a number of attractions in and around Oxford (£69 adult / £39 child) as well as free transport on a number of services. This offers a significant discount on entry prices when used for multiple attractions, and encourages increased length of stay as it is a two day pass. Councillors heard from Experience Oxfordshire that the pass had been developed on good will from partners and to be successful it would require further investment and support which the Council could seek to provide, particularly in regards to going digital. The Review Group believes that in future years, more attractions will sign up to the card, benefitting businesses and users of the pass. The Review Group believes the Council should play its part in promoting the pass through existing media channels.
107. Reverend William Lamb from the University Church of St Mary the Virgin said they were developing an app for wayfinding around the City, based on art installations, as well as looking at options for walks themed around religious history. He welcomed the Council's help where possible in promoting the app once it was operational. The Review Group believes that where such products are developed, the Council should help to facilitate their promotion where there is a clear benefit to the City and its residents.
108. The Review Group heard from the Smart Oxford Programme Manager, a post which the City Council jointly funds with Oxfordshire County Council, that a recent Oxford graduate had developed an app called Sociability which crowd sources information concerning disability access to local venues and attractions. This helps people know in advance whether a venue has the right facilities for them. People can use this platform to share their experiences of access issues in the city, which may drive up standards in future. Consideration should be given to whether the Council should become an official partner of the app.
109. Last year, the City Council passed a motion calling for a reduction in the use of single use plastics. Accordingly, promotion of the Refill Oxford Scheme, which allows free use of water refill facilities with local businesses, would also be welcome.
110. Throughout the review process, councillors heard that there was a need for improved communication between various partners working to improve the visitor experience. There was evidence that many organisations were not aware of work underway elsewhere in the City, such as these apps and initiatives, and duplication of work. The Review Group's meetings provided a valuable opportunity for partners to meet others for the first time, to exchange ideas and build relationships. This forum approach is

something that needs to continue to ensure there is coordination across the City. This could build on the existing work of the Destination Management Organisation, but this will require suitable funding and resources to be in place (see recommendation 3).

Recommendation 12: That the Council takes an active role in promoting and supporting digital innovations and tourism products that benefit the City and its residents. For example, the Oxford Pass, Wayfinding apps, the Sociability App and Refill Oxford. Official partner status should be sought if considered appropriate.

The Discover England Fund

111. Central Government's three-year £40million Discover England Fund (managed by VisitEngland) came to an end this year, which was previously available for organisations to bid into. The purpose of the fund was to offer support for organisations to develop partner led tourism products, such as bookable visitor itineraries and unique visitor experiences for example.
112. Experience Oxfordshire recently secured funding through the Discover England Fund as part of the England's Historic Cities consortium for the development of literary-themed bookable itineraries to target the US market; a market in which Oxford has a unique and competitive offer. The bookable itineraries include an overnight stay in the City which works to the ambition of more international overnight visitors.
113. There are however a number of bookable rail products that have been developed without Oxford in mind. For example, the heritage cities itinerary by rail takes visitors from London to Lincoln, York, Durham and Edinburgh. This demonstrates how some 'would be' visitors may be bypassing Oxford owing to a more joined up and accessible tourism offering elsewhere.
114. Members of the Review Group believe that Oxford is well placed, in terms of its culture, heritage and geography, to be competitive in bidding for this type of funding. VisitBritain suggested that the Discover England fund round one had come to a close and dependant on the spending review, there was no guarantee that it would continue. Councillors believe its continuation would offer a good opportunity to lever in investment for a tourism sector that needs further development in Oxford. It is noted however that the opportunity to become an official Tourism Zone as part of the UK Tourism Sector Deal may supersede this.

Recommendation 13: That the Council writes to local Members of Parliament, inviting the support of Experience Oxfordshire and Oxfordshire County Council, to make the case for the Discover England Fund to continue beyond 2019. Consideration should be given to whether this action is time appropriate in light of any parallel bid to become an official Tourism Zone as part of the UK Tourism Sector Deal (see recommendation 2)

Oxford's Events Calendar

115. Dr Rebecca Hawkins, Managing Director of RHP Ltd, highlighted that there are significant advantages to promoting Oxford to the somewhat untapped local visitor market (those within an hour of the City). This includes making use of existing public transport networks, having less seasonal characteristics, sustaining retail and food outlets that residents also value, and smaller walking groups. A wide range of arts and cultural activities, and a strong events programme, will help tap into this market. The Review Group heard from colleagues at York City Council that they had a very diverse events programme that helped local businesses, though this was principally led by an effective Business Improvement District.
116. The Review Group noted that the Council provides an administrative service in relation to events management in the City, with the Council itself managing only a few events (e.g. Christmas Lights Festival). Therefore, the Council is not involved in designing new and exciting events for the City, and relies on private and voluntary partners to develop the annual events programme, which the Council will react to. The Review Group believes there is an opportunity for the Council to review how it is involved in the management of the annual events calendar, and to be more proactive in developing a schedule of events for the benefit of residents, visitors and local businesses.

Recommendation 14: That the Council reviews its current role in the administration and development of an annual events calendar, and seeks opportunities to be proactive and strategic in shaping a calendar that will increase the City's appeal to regional domestic visitors.

Part 5: Public Realm and Access Improvements

Public Conveniences

117. Some guests were critical of the condition and number of public toilets in the City Centre, and highlighted that it will be a contributing factor in the lower than average level of satisfaction that visitor have. The Council's Companies Scrutiny Panel also made similar comments earlier in 2019, noting that public satisfaction with toilet facilities in the City Centre was rated 2.74 out of 5 on average.²²
118. The Council previously introduced the Community Toilet Scheme, whereby businesses involved in the scheme allow non-customers to use their toilet facilities during their normal opening hours. However, there is no financial incentive for businesses to take on this scheme, and no dedicated Council Officer to manage it. Subsequently, there has been a limited take up of the scheme, and there is no ongoing funding for promoting it.



²² Oxford Direct Services. Quarter 3 2018/19 Performance Report. Available at: <http://mycouncil.oxford.gov.uk/documents/s46746/ODS%20Q3%20Performance%20report%202018-19.pdf>

Demand on the toilets, particularly in Market Street, is far beyond the constrained capacity of the site... Any proposal [to improve City Centre toilets] will very likely give rise to additional costs which the Council as Client will need to consider in a future budget round (p.3).

Extract from Oxford Direct Services Quarter 3 Performance Report

119. There are however success stories elsewhere in developing a similar scheme. For example, in Bristol, the Council decided to end funding for 18 public toilets in December 2017. They now have over 100 venues across the city including local cafes, restaurants and pubs offering free public use of their toilets. Feedback from local businesses suggests that that scheme is a 'win-win', whereby people using their facilities may come back as customers in the future. The local authority pays no fee to local businesses to take up the voluntary scheme, and they have saved in excess of £400k in their annual budget. The review group agree however that a small fee towards cleaning and maintenance may be an option to consider. The Bristol example however is one that Oxford should reflect on. Rachel Cole-Wilkin, Campaign Manager for Use Our Loos UK, explains:

Bristol has one of the most active Community Toilet Schemes in Britain. Theirs is a model for others to look to; they have a clear and simple ask of their members, guidelines for monitoring and comprehensive information available to the public online and in print.²³

120. Councillors heard that some residents may not come into the City Centre because of concerns over not having reasonably ready access to public conveniences. Councillors believe the Community Toilet Scheme has potential to be taken up more widely in the City, if offered adequate promotion and resourcing.
121. Consideration should be given to whether a small fee would incentivise businesses to sign up. There were also comments made that the Town Hall toilets are not well known of, and improved signage or promotion would be welcome. However, in the long term, a better solution needs to be found for the provision and maintenance of adequate public conveniences. Councillors recommend working with Oxford Direct Services to assess what long term options may be possible.

Recommendation 15: That the Council undertakes to revive the Community Toilet Scheme with local businesses, and that it is explicitly within the remit of the Council's new City Centre Management function.

Recommendation 16: That the City Executive Board commissions an options report concerning the long term future provision of adequate public conveniences in the City Centre. This should be produced in consultation with Oxford Direct Services.

²³ Bristol.Gov. 2019. Bristol Community Toilet Scheme. Available at: <https://news.bristol.gov.uk/news/community-toilet-scheme-hits-100-venues>

Static Maps and Wayfinding

122. Tony Hart, Smart Oxford Programme Manager, told the Review Group that many visitors were not well informed about walking routes and the location of attractions, and there was room to improve. Whilst there is the potential for more apps to be developed to address this issue, the scale of Google's online mapping will likely remain dominant and the main navigation tool for visitors. The challenge here however is that the City has poor 3g mobile coverage in some areas. Online mapping shows that there is poor or no coverage across various providers near St John's College, Christchurch Meadow and St Aldates, among other areas. Whilst Google Maps was a primary means of navigating the City, it was noted that not everyone will be able to access the platform, or know how to use it. Therefore, there will likely be a continuing need for static maps also.



123. The Review Group heard that many of the static maps in the City Centre were no longer up to date, and altogether wrong in some instances. For example, the Westgate Centre is not included on some maps. Councillors were also of the view that signage links between the Westgate, the Covered Market, Cornmarket Street and the Castle And Prison could be significantly improved. The Review Group believe that the castle is an often overlooked visitor attraction, which is ideally located for rail passengers to visit on their way into the city centre.

The Covered Market should be the jewel in the crown of the retail experience in Oxford.

Guest contributor

124. Council officers advised that simple and low cost finger posts for wayfinding are an effective way of helping people to navigate the City. These are a cost effective alternative to high cost interactive wayfinding information points, and may be cost saving in the long term. An ongoing revenue allocation for signage upkeep and maintenance will be required however.

Recommendation 17: That provision is made in the City Executive Board's draft budget proposals for 2020/21 to include an allocation for updating and/or upgrading the current static maps and signage in the city centre. This should specifically include creative signage between the Westgate Centre, the Covered Market, Cornmarket Street and the Castle and Prison. An ongoing revenue allocation should be provided for their maintenance and review.

Waterways

125. The Review Group welcomes the role of the Waterways Coordinator in working with partners to identify opportunities to improve the waterways offer in the City. Oxford is a city built on the waterways; the River Thames, Cherwell and the Oxford Canal, together with a network of smaller streams are an asset, providing unique opportunities to promote Oxford as an attractive tourist city. The waterways also provide open riverside spaces to help manage tourism numbers in a compact city.
126. There is also potential to develop an improved water network and create additional routes by which tourists can reach the City. This includes those boating in from elsewhere, but also those taking day boat trips, trying a punt, canoeing, or participating in water sports events. The Waterways Coordinator told councillors that Oxford could be a premium destination for those arriving by boat, with gateway areas close to the Centre where people can visit for a short or overnight stay. However, there are significant challenges to maximising this potential, not least with mooring congestion and scarcity of service provision as well as the general look and feel of the waterside public realm. Any changes to the physical infrastructure of the waterways come at a significant cost.
127. The Review Group noted that alongside the waterways, the Thames Path National Trail, long-distance walking routes, cycle paths and footpaths provide connectivity for those near the City as well as those coming from afar. Within close distance to the City Centre are a number of routes alongside the waterways, such as Christ Church Meadow, which should be an attraction in its own right and help spread tourism's impact and benefits to other areas.
128. Councillors believe the physical infrastructure of paths, wayfinding, the provision of information and the promotion of the waterways as an attraction could all be improved. The Review Group heard that Oxford is often perceived as avoidable for boats because of its poor access and lack of facilities. Dr Hawkins suggested that improved use of the waterways could make Oxford a heritage+ city, offering a wider diversity of attractions than those in the concentrated centre.
129. The Council has a partnership project, the Oxford Waterways Project, which locates tourism as a priority theme within its strategy. Through the Waterways Coordinator, this provides an ideal opportunity to secure buy in from partners for improving the waterways, and making long term plans for improvement.

Recommendation 18: That the Council considers the potential of the City's waterways as a visitor attraction and leisure asset in future policy making (e.g. planning and licensing) and investment decisions, and works to support the Oxford Waterways Project to create new tourism opportunities through regenerating and improving facilities (e.g. in particular, boating facilities).

High Capacity Walking Tours and Language Schools

130. The Review Group were informed that Experience Oxfordshire host the only official walking tours in Oxford, with professional walking guides and limited group sizes, avoiding pedestrian pinch points. Users of this service had increased from 30,000 to

40,000 in recent years. Councillors and guests raised concerns over the size of other walking tour groups in the City and the quality of those tours.

131. Groups of over 50 sometimes walk around the City, which are unmanageable for the tour guides, and dominate public spaces and narrow footpaths. These larger walking groups were understood to be either:

- Unregulated 'free' walking tours
- Package coach tours
- Part of language school visits

132. The Review Group believes that the catch all term 'language schools,' which broadly applies to visiting school groups from abroad, have the potential to be a vulnerable group, and safeguarding concerns have often been raised. They are often housed in university accommodation during the summer recess for a two to four week period.



133. At the end of the review process, councillors heard that there had previously been a code of conduct, management procedure or guide to good practice for visiting language schools using university premises. This should be explored to see whether it is still being used, and what role the Council might have in reviving and promoting its use for visiting schools. Councillors are aware of a previous (potentially ongoing) multi-agency language forum which looked at these types of issues, such as a spate of bag-snatching incidents from young visitors in recent years. Operational protocols were also agreed for circumstances when a child went missing from their group.

134. Councillors are of the view that if these large cohorts can be divided into smaller groups, it will provide a safer and more enjoyable experience for visitors, and also for residents through the dispersal of crowds. It was agreed that more clarity was needed on whether this language forum was still operational, and that Councillors should be made aware of it if so.

Recommendation 19: That the Council reviews to what extent codes of conduct exist for managing the behaviour of students at language schools (including the management of large groups in public spaces), and seeks to ensure they are being used to safeguard visitors, and satisfy the behaviour expectations of residents. All Councillors should be provided clarity on whether the language schools forum is still operational, and its role and remit if so.

University College Opening Hours

135. Oxford University and its colleges draw in visitors from around the world. However, residents and councillors suggest that the opening times of the colleges are not well known, and having colleges open at different times causes confusion. It was noted that some of the colleges were looking to extend their opening hours. The Chair of

Conference Oxford explained that approximately 30 colleges were open to the public at certain times, 20 of which were free. The [Oxford University website](#) lists the opening hours and fees for the various colleges, as does the Experience Oxfordshire consumer site.

136. It was suggested that many visitors and residents are disappointed to discover that a specific college is not open when they come to visit. Councillors and other partners were not aware that such a significant number of colleges were open to the public, and many suggested there was a need for greater publicity about their opening times. It is recognised that the colleges are principally academic institutions, and their visitor attraction status are a secondary consideration. However, the Review Group believe greater steps could be taken to promote their opening conditions, particularly for local residents to benefit from.

Recommendation 20: That the Council makes representations to Oxford University, welcoming greater publicity concerning public opening hours for the colleges, and other practical steps to improve resident and visitor awareness of, and access to, the colleges.

Involving local businesses

137. In visiting York and Cambridge, the Review Group met with a number of other councillors and DMO staff. Each of these destinations has a Business Improvement District (BID), among over 200 elsewhere in the UK. A BID is a specifically designated area where businesses work together to invest in services, projects and events with the aim to increase economic development and growth.²⁴ BID projects are in addition to services provided by councils, and are funded by an annual contribution as a percentage (usually 1%) of the rateable value from businesses in the area. The introduction of a BID requires the majority of businesses in that area to vote for it.
138. It is common for BIDs to see themselves as destination management organisations.²⁵ However, the Review Group heard from Cambridge that BIDs were more focussed on the destination as a product, and the look and feel of the City, whereas DMOs were more focussed on marketing and supporting the visitor welcome. The CEO of Visit Cambridge and Beyond explains that the DMO and BID must work “Hand in glove, from the bottom up, in order to avoid overlap and duplication on delivery.”²⁵
139. Cambridge is in year two of their second five year levy period and the BID covers a large city centre area. They run an Ambassador Service, as well as other aspects of the visitor welcome, including marketing and events. Similarly, the York BID has service level agreements with the Council for additional street cleansing activities, floral arrangements and ‘litter heroes’. They also have ambassadors to welcome and direct visitors at the

²⁴ The York Bid. 2019. Information about BIDs. Available at: <https://www.theyorkbid.com/about/the-bid-overview>

²⁵ VisitBritain. 2014. City Centre Management and the Visitor Economy. Available at: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/guidance_on_city_centre_management.pdf

railway station. These are examples of work that Oxford might benefit from and would help in increasing visitor satisfaction.

140. The Review Group were keen in particular to highlight the value that ambassadors at the bus and rail stations could bring. This is one way that recommendation 14 concerning new models of events management might be taken forward in future. Cambridge and York both advocated for the introduction of BIDs, which when managed effectively, had the potential to generate significant investment for their areas.
141. The Review Group recognise that the introduction of a BID in Oxford would need to be driven by local businesses themselves. There may also be other ways by which local businesses can help to improve the visitor welcome through collective action. Accordingly, where there is opportunity for the Council to support local businesses in leveraging in collective funding and resources to improve the public realm and visitor experience, this should be done.

Recommendation 21: That where business led opportunities arise; the Council should take a full and active role in leveraging in the influence of the business sector to improve the public realm and wider visitor offer.

Chapter 5: Conclusion

142. The Review Group's recommendations have asked the Council to take a fresh look at tourism and the visitor welcome in Oxford. The City has the potential to be a world class visitor destination, but the data shows that levels of satisfaction are below average. This is disheartening given that Oxford's is famed worldwide for its heritage and academic pedigree.
143. The Council's partners have suggested there is complacency in the thought that Oxford is, and will always be, a thriving visitor hub. They said the Council lacks a vision for the City, which they might otherwise take direction from. They expressed disappointment with the Council's decision to reduce funding to Experience Oxfordshire, signposting a well-resourced DMO as the cornerstone to having an attractive visitor offer, and thus a thriving visitor economy. The imminent Tourism Sector Deal may be key to turning this tide and leveraging in the investment needed to implement an ambitious but realistic vision for tourism in the region, if a successful bid was made.
144. These are the key messages from partners, and the Review Group has listened and made recommendations to suit. It is hoped that this work will be welcomed as a positive contribution to the evidence base for the Council's policy development, and a body of work that serves to highlight the importance of partnership working and investment in the visitor experience.

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