

To: Scrutiny Committee
Date: 6 October 2020
Report of: Executive Director of Development
Title of Report: Tourism Review Recommendations Update

| Summary and recommendations | |
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| Purpose of report: | An update report on the progress made against recommendations arising from the Tourism Review Group |
| Key decision: | No |
| Cabinet Member: | Cllr Mary Clarkson, City Centre, Covered Market and Culture |
| Corporate Priority: | Inclusive Economy |
| Policy Framework: | Council Strategy 2020-24 |
| Recommendation(s): That the Scrutiny Committee resolves to | |
| 1. Note and comment on the update | |

| Appendices | |
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| Appendix 1 | Action Plan Update |

Introduction and background

1. Cabinet agreed the vast majority of the recommendations that were endorsed by the Scrutiny Committee on May 29th 2019. Since then, officers have worked to pursue these recommendations as fully as possible, with areas of notable progress made up to March 2020. The Update table in Appendix 1 highlights our progress against each of these recommendations and should be referred to alongside this report for a full update.

COVID-19 and the Visitor Economy

2. The COVID19 Pandemic has dramatically affected the Visitor economy and reduced city footfall from workers and residents, as well as international tourists. Footfall is currently at around 39% down year on year and 52.9% down for the year to date¹, reflecting Oxford's reliance on workers, students and of course,

¹ Springboard, Sept, 2020

tourists. Recent ongoing restrictions for the hospitality sector announced on 22nd September will create ongoing headwinds for recovery planning. They will also create business support needs that Council will have to try and fulfil with partners such as OxLEP and Experience Oxfordshire. It is expected the economy will take at least three years to recover lost ground² with of 4-7 years to full recovery of demand the global tourism economy³. This is a significant challenge for a city where 15% of employment is visitor economy related.

3. Oxford retains inherent visitor destination strengths, and as such the importance of the Visitor Economy to our economy is recognised in the draft Oxford Economic Strategy and City Centre Vision and Action Plan (due for draft publication and consultation winter 2020). A priority for these strategies will be recovering and rebuilding Oxford's Visitor Economy. Oxford City Centre will continue to provide an important location for recreation, heritage, creativity and the arts, benefiting the population of the city and its wider hinterland, as well as a basis for attracting tourists to the city.
4. While Oxford is already a global tourist destination, more will need to be done to capture longer stays and offer greater diversity of activity to aid recovery and long-term visitor growth. A key part of this will focus on boosting diversity of uses, and in turn resilience of economic activity in the city centre (e.g. Science and technology, creative and cultural, community and residential activity), which will boost worker and resident visits, as well as those of tourists.
5. It should be noted that since March the City-wide and city centre recovery activity has fully utilised officer resource across the council during the last six months. As such, progress of the longer-term planning around the Economic Development Strategy and also the City Centre Vision has been delayed.
6. Inevitably, the Pandemic has shifted the focus - from one of Tourism demand management and increasing the value of visits - to a focus on supporting and restarting the visitor economy related sectors, following an abrupt halt in visitor demand. A range of businesses have then needed support to rebound. This has included provision of almost £27m of grants being distributed, £57m in rate relief provided, business support measures, and support for our tenants, and a range of new street level measures to boost consumer confidence in visitor safety and business confidence in reopening. Visible and notable examples of this include the rapid set-up of outdoor tables and chairs, pedestrianisation of key areas such as George St, the City Council and Oxford Mail's #rediscoveroxford campaign. Also our Business Regulation team is providing ongoing support to business to comply with changing Covid-19 restrictions. The focus is, and remains, on the safe re-opening of our city centre and accelerating recovery for the time being.
7. Finally, county-wide OxLEP are developing an Economic Recovery Plan to submit to central Government in December, which will make the case for visitor economy sector support. This will build on the case for intervention made in the LIS Implementation Strategy, which OxLEP published in September 2020.

Financial implications

² Ernst & Young 2020

³ McKinsey, 2020

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Legal issues

9. N/A

Conclusion

10. Members should note the progress made in challenging circumstances. The recommendations will need ongoing review in-line with the City Centre and Economic Strategy of which they are a part. However, the current pressing concern remains supporting those businesses that are directly impacted by current restrictions that affect viability and jobs.

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| Report author | Matt Peachey |
| Job title | Economic Development Manager |
| Service area or department | Regeneration & Economy |
| Telephone | 01865 252021 |
| e-mail | mpeachey@oxford.gov.uk |

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| Background Papers: None |
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Appendix 1 – Tourism Review Group Recommendations Update

| Recommendation | Update as of September 2020 |
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| <p>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.</p> <p>Key principles of the vision should situate Oxford as a city that:</p> <ul style="list-style-type: none"> a) welcomes all visitors (local, national and international) b) Aspires to have high-quality, low carbon, transport facilities c) Is best experienced through an overnight stay d) A gateway to other tourism destinations in the region | <p>It was agreed that this would be pursued as part of the Economic Strategy and City Centre Vision and Plan, and that consideration was needed regarding locally available resources to deliver on the vision. Consultation drafts are expected to be published in 2020.</p> |
| <p>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.</p> | <p>Government published the Tourism Sector Deal in June 2019. An Oxfordshire working group was set-up to explore Oxford’s needs for potential Tourism Zone (5 were mooted as part of the deal). This included the LEP, Experience Oxfordshire and The City Council. A discussion paper on the options for such as zone in Oxfordshire was prepared.</p> <p>However, there has since been no clarity from government on whether a Tourism Zone policy will be pursued. Officers are monitoring this for any new announcement or similar initiatives.</p> |

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| <p>Recommendation 3: That the Cabinet 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</p> | <p>In part agreed. This was a budget decision made February 2019 in accordance with the council's procedures. Councillors then assessed this alongside all other budget reductions and proposals. It was agreed it is important we engage in conversations with all relevant stakeholders on finding the most appropriate funding model to permit a sustainable approach to tourism promotion and destination management. We have since discussed the possibility of commissioning various services from Experience Oxfordshire as a possible way of providing funding. One such area is the City Council co-funding the England Originals campaign as a way to attract domestic visitor markets post COVID. Another is annual procurement of the data on the volume, value and employment benefits of tourism.</p> |
| <p>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.</p> | <p>Not agreed. It was agreed that a senior officer, in this case, the Director of Development takes up the position on the board.</p> |
| <p>Recommendation 5: That the Council has a named officer or team to be recognised as the lead on tourism matters.</p> | <p>Yes. Director of Development with support from the Regeneration and Economy Service.</p> |
| <p>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. Further, that the Council's promotional activity around the Oxford Living Wage incorporates customer facing marketing, which encourages conscience driven spending with Oxford Living Wage accredited shops and services.</p> | <p>This is already resourced in line with previous recommendations. Seven of the 30 members of the OLW self-certification scheme are from visitor economy related enterprises. Under the COVID-19 Discretionary Grant Scheme, officers sought information from applicants as to whether they paid the Real Living Wage of more than £9.30 per hour as part of the evaluation process. 245 of the applicants stated they did pay at least £9.30 per hour, many of these Retail, hospitality and leisure businesses. Officers are now encouraging those that received grants to accredit formally on either or both schemes (RLW or OLW).</p> |

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| | <p>Aside from the above, given the sector is struggling due to ongoing restrictions, the future focus is likely to be on encouraging enterprises creating new jobs to pay OLW, particularly where they receive business support. The OLW remains a high priority in the Draft Economic Strategy.</p> |
| <p>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.</p> | <p>In part. <i>Both Councils are committed to improving the coach operation for the benefit of residents and visitors. We recognise that effective management of coaches can assist in reducing congestion, improving air quality and safety. There are number of challenges that need to be addressed before the Council could meet the seven objectives set by the Confederation of Passenger Transport (CPT). However, we would be happy to engage the CPT in this process. It will probably require a joint city and county resource to be employed/identified for a defined period to be effective.</i></p> <p>Officers have since engaged with the Confederation of Passenger Transport to understand what is required to become a 'Coach friendly city'. The requirements were not immediately achievable without improvement to coach drop off and layover facilities. Following this, County council colleagues have been engaged at length to discuss and agree potential new drop off locations that can be clearly signposted to the industry. A survey of coach drivers and passengers was also prepared prior to the COVID pandemic, drawing on lessons from Cambridge. Due to the COVID response and recovery, this has not been advanced as yet, given the lack of coaches in the city.</p> <p>Plans to communicate the information required to drivers and coach firms were also being prepared for City, county and Experience Oxfordshire websites, but have been paused at present.</p> <p>City and county officers have already met to assess the current</p> |

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| | situation and have a further meeting in the diary to see if reinstate plans for 2021, starting with the survey and new communications. |
| 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. | <p>Yes. See above. Also This is being done as part of the usual policy consultation process, with the County Council preparing a new Transport and Movement Strategy for Oxford, which is intended to align with the Connecting Oxford proposals, which will prioritise public transport, including tourist coaches</p> <p>The Economic Development and City Centre strategies will place clear priority on sustainable movement and connectivity for the long-term needs for the city's economy as well as a strategic priority to rebuild the visitor economy.</p> |
| 6 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. | Yes – See point 7, which covers this. |
| 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 | Yes – see point 7, which covers this. The survey has been drafted. The timing of publication needs to be agreed with our partners. The draft will need to be reviewed given the changes in operation brought about by COVID. |
| 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, | In part. We continue to monitor the situation. Whilst this is not high up the policy agenda for government at present, and LGA survey earlier in the year suggested 53% of 2,023 UK residents polled for the Local Government Association (LGA) want their local authority to be able to charge a small fee to help support |

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| <p>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.</p> | <p>tourism in their area. We will see what opportunities may come forward as Devolution and Local Recovery Policies evolve in the coming months. Local tourism business needs will have to be carefully considered alongside this. The LGA also pushed for piloting of Levies in any Tourism Zones agreed.</p> |
| <p>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.</p> | <p>In part. The City Council offered to promotional or sales support to Experience Oxfordshire, who recently piloted the Oxford Pass, during the early phases with the Oxford Bus Company and Blenheim Palace. This offer of support was not required until after the pilot phase was complete, and it might have been expected to be scaled-up. The Oxford Sociability App developers were engaged through the Smart Oxford Programme.</p> <p>Recently, Oxford City Council and the Oxford Mail partnered to boost city centre businesses and cultural attractions by encouraging people to 'Rediscover Oxford'. The campaign aimed to encourage local residents to visit their home city for day trips, and those from further afield within the UK to visit for staycations. The campaign also encouraged local residents to reengage with their city through cultural activities.</p> |
| <p>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 Yes This will be coordinated with partners.</p> | <p>Yes. The Discover England Fund was already likely to be continued at the time this was first agreed. It has since benefitted Oxford directly. England's Historic Cities consortium year 5 Discover England Fund (DEF) bid has been successful with project top up/enhancement/development of nearly £200k. This is a project that enables Oxford to be promoted via VisitEngland with Experience Oxfordshire as the delivery partner on the ground. To date, this project has attracted investment of £1.5million and a link to the website can be found here https://www.englandoriginals.com</p> <p>Oxford City Council will use the Reopening High Streets safely</p> |

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| | <p>Fund to help match fund the project with £5,000, leveraging in significantly greater funds to promote Oxford. The focus of the project is as follows;</p> <ul style="list-style-type: none"> • Enhance existing web platform, app and trade engagement • Pivot the project to promote the cities to the domestic markets (previously a USA only campaign) to ensure destinations benefit in the autumn/winter months • Target market is the millennials as the ones that have the most confidence to travel • Continued engagement with USA trade operators to attract return international businesses from spring 2021 • Add to existing product offer • Provide new video and photography assets. |
| <p>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.</p> | <p>Not agreed.</p> |
| <p>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.</p> | <p>In Part. Experience suggested that this was a challenging ask given the potential for ASB issues. The City Centre Manager (CCM) has considered the options available on the scheme and has fed this into the City Centre Vision work. If there is business interest and support as part of the strategy consultation, it will be pursued as a project for the action plan. The CCM has had initial conversations with businesses regarding the scheme.</p> |
| <p>Recommendation 16: That the Cabinet commissions an Option report concerning the long term future provision of adequate public conveniences in the City Centre. This should be produced</p> | <p>In part. A members Briefing was provided in October 2019 with a range of options reviewed. Whilst desirable, any new investment in this area will be paused due to budgetary constraints. Officers</p> |

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| <p>in consultation with Oxford Direct Services.</p> | <p>will look at where opportunities for provision can be aligned with future developments across the city centre.</p> |
| <p>Recommendation 17: That provision is made in the Cabinet'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 and Cornmarket Street. An ongoing revenue allocation should be provided for their maintenance and review.</p> | <p>It was agreed by Cabinet in June 2019, that this recommendation will be explored with the proviso that consideration is given to options that use existing space / street furniture / buildings, that anything done on this is future-proofed and that the emphasis is on innovation and takes into account the need to limit 'street clutter'. This project is identified a priority action in the Draft City centre Vision and Action Plan, assuming resource can be identified for delivery.</p> |
| <p>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).</p> | <p>Notable improvements include major towpath resurfacing works to improve cycle/walking and general leisure use of the waterways, new signage and some facilities improvement. Working closely with volunteers, a wide range of environmental improvements include habitat creation and tree planting. Working with the Environment Agency wrecked/abandoned boats have been disposed of to remove hazards and improve the public realm. Investment was made in delivering a tourism promotion campaign in partnership with Experience Oxfordshire over 2020. Work is ongoing to try and implement new visitor moorings at Folly Bridge.</p> <p>Port Meadow marina remains a major focus with investment approved to implement improved health & safety and security measures on the site and a feasibility study has been commissioned to examine options for the much-needed repair/upgrade to this important infrastructure.</p> <p>To continue to assist with this programme of work, the Waterways officer post has been renewed until August 2021 although 3 days per week. A fuller update on the work of the waterways officer will be provided to Scrutiny Committee in November. Finally, Waterways will be a proposed sub-theme in</p> |

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| | the Draft City Centre Strategy under an overarching strategic aim of Rebuilding the Visitor Economy. |
| 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. | In part, noting significant resource challenges. Language school managers, police and Safer Oxford colleagues were involved with CCM in an initial meeting in Autumn 2019 with a view to scoping how this type of policy could work. Plans for twice yearly forums with follow up individual meetings were proposed. The COVID19 Pandemic has meant this work is currently paused as Language Schools face ongoing financial challenges. |
| 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. | Yes. Experience Oxfordshire provides details of the Opening Hours of Oxford's Colleges as does the University of Oxford. |
| 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. | Yes. We are pursuing this on an ongoing basis as part of developments coming forward in Including the Northgate Development, Oxpens and Station Masterplan, for example. Moreover, the City Centre COVID19 Recovery Plan and Reopening High Streets Safely Fund has been used to enable greater resting, active travel, and outdoor seating space to support people and businesses to return to visiting and trading in the city. |

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