

To: Scrutiny Committee
Date: 11 April 2024
Report of: Head of Regeneration & Economy
Title of Report: Tourism Management Review Group Update

| Summary and recommendations | |
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| Purpose of report: | Update for Scrutiny Committee on progress regarding Tourism Management since 2021 |
| Key decision: | No |
| Cabinet Member with responsibility: | Councillor Susan Brown, Cabinet Member for Inclusive Economy and Partnerships |
| Corporate Priority: | Enable an Inclusive Economy; Pursue a Zero Carbon Oxford |
| Policy Framework: | Oxford Economic Strategy 2022; City Centre Action Plan 2022 |
| Recommendation(s): That the Committee resolves to: | |
| 1. Note and comment on the report. | |

| Appendices | |
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| Appendix 1 | Recommendations of the Tourism Management Review Group – April 2024 Update |

Introduction and background

1. On 29 May 2019, the Tourism Review Group’s report and recommendations were submitted to Cabinet and responses agreed: [29 May 2019](#). Of the 21 recommendations, 10 were agreed, 10 were agreed in part and 1 was not agreed – the final report and responses to the recommendations are included in the link above.
2. On 6 October 2020, a progress report was submitted back to Scrutiny Committee – [06 October 2020](#). The report and action plan update are accessible via the previous link; the cover report provided some narrative around COVID-19 and the impact on the visitor economy; the action plan update provided an update on all of the 21 recommendations as at September 2020.

3. On 8 September 2021, a further progress report was submitted to Scrutiny Committee – [08 September 2021](#). The report and action plan update are accessible via the above link; the cover report provided some narrative around COVID-19 and the impact on the visitor economy; the action plan update provided an update on all of the 21 recommendations as at June 2021.
4. At that September 2021 meeting, the Scrutiny Committee made an additional 4 recommendations. These were accompanied by a cover report. The report and recommendations were submitted to Cabinet at its meeting on [15 December 2021](#) – all four recommendations were agreed:
 - a. That the Council plans how it will work with those responsible for tourist travel to Oxford more environmentally sustainable.
 - b. That the Council revives its partnership with City Centre shops to provide a toilet scheme.
 - c. That the Council in its work with partners, pursues a renewed focus on attracting domestic tourists to Oxford
 - d. That the Council reviews and updates its responses to the recommendations made by the Tourism Review Group in light of the changes of Covid and the proposed Oxford Economic Strategy and City Centre Action Plan.
5. There has been no further update to the Scrutiny Committee since the report of 8 September 2021. But the Committee agreed earlier this year to request an update, which is now supplied in this report, which contains an overview of the current approach to tourism in this report and an itemised response to the 21 + 4 recommendations in **Appendix 1**.

Overview of tourism in Oxford

6. Current data about the tourism sector relates to 2022 and shows significant progress in recovering from the impacts of the pandemic. The Economic Impact Report for Tourism in Oxfordshire (2022) produced by Experience Oxfordshire Local Visitor Economy Partnership (LVEP) demonstrated increases in both visitor numbers and related expenditure in 2022 compared to 2021, with numbers of trips to the county rising by 14% to 26.5 million.
7. Spend in nominal terms was up 38% at £2.17 billion and 2022 saw a rise in the number of jobs supported by the visitor economy with some 10% of the county's workforce employed within the sector. Business visits and events showed a significant increase (following a severe dip in numbers over the previous two years) with business tourism accounting for 27% in 2022 compared to only 7% of trips taken to Oxfordshire in 2021.
8. Oxford was close second to Cherwell of the Oxfordshire districts in terms of proportion of visitor trips during 2022 and accounted for the greatest proportion of visitor spend (40%). Overnight stays in Oxford were above national average length of 3 nights in 2022, with Oxford had 6.2 nights for overseas visitors and 2.6 for domestic visitors. In 2022, the national average duration of overnight trips in England was 3 nights. Oxford had 6.2 nights for overseas visitors and 2.6 for domestic visitors. There is an equal split in visitor numbers domestically and internationally. No figures are yet available for 2023 but are expected to be more buoyant, as the overseas visitors started to return after the pandemic.

9. However, despite these improvements we know there is still work to do to return to pre pandemic levels and ongoing challenges. In 2022 Oxfordshire were still 14% down on the number of trips taken in the county when compared to 2019, with the sector generating 17% less value in real terms. This has impacted on businesses' ability to operate, develop and grow.
10. Employment within the sector has grown by 28% year-on-year, but again that's still 17% down, in real term value, on 2019 and while spend is growing, the cost of living increased sharply across the UK in 2022 and the average annual inflation rate for the year was 8% reducing the real terms value of this growth.

How the Council has contributed to progress relating to tourism

11. The Council has made progress on tourism as part of both the Oxford Economic Strategy and City Centre Action Plan including work with key partners in the following areas:
 - a. Continuing to work with Oxfordshire County Council (the highway authority) to improve the way people access and move around the city, for example by supporting the decision to implement trial traffic filters in 2022; and establishing an affordable combined parking-and-bus ticket from Park & Rides on a permanent basis in 2023.
 - b. Starting a new joint project with the County Council called the Central Oxfordshire Movement & Place Framework, which is seeking to create a blueprint for public realm improvements in the city, and which is incorporating a coach parking strategy.
 - c. Delivering tangible improvements to the public realm in the city centre alongside the County Council, in order to make create more welcoming places for all, including tourists:
 - i. Broad Street – two trial schemes, the latter of which has been made permanent
 - ii. A trial pedestrian-friendly scheme on Market Street (delivery in April 2024, subject to County Council decision-making)
 - iii. Improvements to Gloucester Green
 - iv. The permanent improvement of a pedestrian area on St Michael's Street (delivery scheduled for 2024-25)
 - d. Working with OxLEP, assisting in the delivery of the £1.64 million COMF funded Visitor Economy Renaissance Programme (VERP) which provided grants to eligible businesses; provided nine strategic marketing campaigns; support for a dedicated business trade project; and enabled the creation of Oxfordshire's first Destination Management Plan. The Council was involved in assessing Visitor Economy Grants, overseeing the marketing campaigns through their membership on OxLEP's Culture and Visitor Economy Subgroup, and also being a key member of the Destination Management Plan (DMP) steering group, informing and directing [the plan and its recommended actions to support the sector for the next five years](#) (p86-265). The VERP programme was identified through the Oxfordshire Economic Recovery Plan, and prior to that within the Oxfordshire industrial strategy investment plan.

Looking to the future

12. Oxfordshire LEP (OxLEP) have also since funded, on behalf of partners including the City council, a DMP Strategic Funding Options paper (*to be published by OxLEP in due course*) to explore ways to fund the recommended actions described in the DMP. The Future Oxfordshire Partnership (FOP) at its November 2023 meeting agreed to endorse the proposed future governance of the DMP within the FOP to enable shared support for the visitor economy sector across Oxfordshire.
13. The existing funding restrictions for tourism management are a significant handicap for the Council, so the exploration of options regarding funding is an important ongoing activity.
14. We hope to continue to work with partners across the county through the Future Oxfordshire Partnership (FOP) to reduce negative impacts from tourism and improve the experience of tourists in Oxford, assisting delivery of the recommended actions of the Destination Management Plan.

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Background Papers: None