



Culture & Visitor Economy Sub-Group Meeting

Monday 14th September 2020, 10-12

Virtual via Microsoft Teams

Draft Minutes

Present:

John Hoy, Hoy Consultancy (Chair)
Ahmed Goga, Director of Strategy and Programmes, OxLEP
Cllr Lorraine Lindsay-Gale, Cabinet Member for Education and Culture, OCC
Bob Price, Pegasus Theatre
Ruth Taylor, Strategic Manager, Artswork
Miranda Markham, Bicester Village
Dr Peter Lugosi, Deputy Director of the Centre for Business, Society and Global Challenges and Research Lead for the Hospitality and Tourism subject area, Oxford Brookes University
Lucinda Whiteley, Novel Entertainment
Hayley Beer Gamage, Experience Oxfordshire
John Newbigin OBE
Hedley Swain, Area Director South East, Arts Council
Lucy Shaw, Head of Programmes and Partnerships, Gardens, Libraries and Museums (GLAM), University of Oxford

In Attendance:

Richard Bellamy in place of Stuart McLeod, National Heritage Lottery Fund
Helen Ryan-Wallis, Strategy Development Executive, OxLEP
Alexandra Capata, Strategy Development Assistant, OxLEP
Josh Fedder, Assistant Director for Oxfordshire, BEIS
Professor Karen O'Brien, Head of the Humanities Division, University of Oxford
Dr Victoria McGuinness, Head of Cultural Programming and Partnerships, Humanities, University of Oxford
Kate Macleod, Assistant Director, Cultural Services, Oxfordshire County Council

Apologies:

Stuart McLeod, National Heritage Lottery Fund
Paul Hobson, CEO, Modern Art Oxford

	Item	Action
1.	Introductions and welcome JH welcomed all to the meeting and noted that Richard Bellamy was standing in for Stuart MacLeod (NLHF), Lord Neil Mendoza was joining us for items 3 and	

	4, Professor Karen O'Brien was joining us for item 3, and Jody Tableporter was joining for Item 5.	
2.	<p>Minutes from the meeting held on 1 June 2020 were accepted as a true record of that meeting.</p> <p>The updates on matters arising are:</p> <ul style="list-style-type: none"> • Creating an Arts smaller working group is still to be actioned, to be discussed after Item 3. • Festival 2022 - HRW will investigate how to apply and gather further information now information has been released this week. It appears to be a 'STEAM' consortium, R & D showcase opportunity. • From HS - the Arts Council Strategy will be launched in January 2021. To include as an item on the next agenda. • AG reminded the group to keep disseminating information about the available Growth Hub grants and that a new round is being launched to ensure more arts, cultural, tourism, creative organisations apply. • JH let the group know that Bernard Donoghue, Director of ALVA - The Association of Leading Visitor Attractions and Mayor of London's Ambassador for Cultural Tourism is attending our next meeting in November with regards the visitor economy. • AG also asked the group to share intel with regards apprenticeships ie retained, suspended etc. • RT - Artsworld has started engaging with cultural organisations in hosting potential opportunities under Kickstart. • With regards the JF action, the document has only recently been published (due to a delay) - it will be shared with minutes. • The OXIA update will be under AOB. Moving forward, OXIA ambitions has been on hold due to COVID but the aim is to action this with a smaller working group. 	<p>HRW</p> <p>ALL</p> <p>ALL</p> <p>HRW</p> <p>HRW & JH</p>
3.	<p>A Focus on Arts & Cultural Workstream</p> <p>JH welcomed The Lord Neil Mendoza, DCMS Commissioner for Cultural Recovery and Renewal to the meeting for items 3 and 4.</p> <p>NM introduced himself and described the national role he has for both DCMS and for No.10. It is great for the sector and shows the government's commitment to this hardest hit sector. DCMS has a key focus on Arts, Heritage and Museums and, although the creative industries are in a different department, NM works with them also.</p> <p>NM has been a board member of DCMS for approximately 4 years so understands DCMS and how it runs, and has other formal roles for DCMS which include being on the Secretary of State's Task Force which sets guidelines; being on the independent board now approving the Cultural Recovery Fund; alongside other roles where culture impinges such as on softpower, on philanthropy, and across the department. He works with the Secretary of State, Ministers, specialist advisors, DCMS officials at No.10, the Treasury, and the Cabinet Office.</p> <p>The interplay between Culture and the other sectors is now understood by Government and they recognise the importance culture plays in place, and levelling up.</p> <p>Four main concerns at Government level:</p>	

1. Financial sustainability of organisations (hence putting in place the job retention and self-employment schemes). There is recognition of the catastrophic situation this sector is in and that many organisations may not survive. Some weren't secure financially pre-COVID (such as Hays Market Theatre, Southampton Theatre).
2. Social distancing implementation (Rule of 6 is also now a significant challenge) across the Cultural Sector.
3. Confidence – even when open, will audiences return in numbers experienced pre-COVID? Many are currently only operating at 25% capacity, and some are operating at even lower levels.
4. Concern about the talent pipeline and the hardship facing freelancers, skilled practitioners, etc.

The focus is on re-opening these vital sectors and ensuring they are COVID secure and distributing the Cultural Recovery Funds.

With regards to Tourism – DCMS are working with the Foreign Office and the Department of Transport to assist the sector, and are also looking to try and support the Destination Management Organisations (DMO's). NM is aware Cambridgeshire has gone bust. NM welcomed more information from Experience Oxfordshire DMO and their experiences.

HBG to provide information to NM.

HBG

A positive is that DCMS has closer relationships with many organisations across the country and both the Minister for Tourism, Heritage and Sport- Nigel Huddleston MP - and the Minister for Culture and Creative Industries - Caroline Dineage MP - have five working groups on visitor economy, heritage, museums, events and entertainment, and libraries who meet regularly gaining important feedback and intel from working group members.

Whilst performing arts and museums have been open for a month on a socially distanced basis (stage 4) it is recognised that this is not commercially viable. The aim is to get organisations to stage 5 following some pilots over the next three months, i.e. opening without social distancing or at least with fuller audiences.

The Cultural sector is engaged with 'Project Moonshot' which is offering "same day" testing at certain venues.

The campaigns 'Eat out to Help out' and 'Enjoy Summer Safely' were launched to boost demand, and to get people back into public spaces and to raise confidence levels.

NM mentioned the Arts Council Emergency Funds (£160 million) which had been distributed well.

Previously the Treasury had not been keen to do sector specific support, but they are now interested in supporting and saving the sector. NM liaises with the Treasury daily. There are many other avenues for grants and funding for heritage, arts and museums (both capital and revenue).

NM enquired as to which Oxfordshire organisations had applied to any of the schemes? All to feedback any relevant data or intel to NM

ALL

The national schemes are now all closed, and bids are being appraised. NM is on the approving board so isn't able to divulge more at this stage.

The key focus for DCMS now is the allocation of funds (rescue recovery), then proposing ideas for inclusion in the Comprehensive Spending Review – i.e.

finances required for culture and the arts, and for arms length bodies such as the Arts Council for the next three/four years.

Academically, NM is chairing 'Boundless' with Professor Andrew Thomas at Oriol who is also the Chair of the AHRC which is researching how organisations are adapting, including those in the digital sector, to help apply learnings and findings with the cultural sector.

Overall the wish is to see the cultural sector emerge from this. There is great innovation occurring. There will be change in the sector, pre-COVID there were 40,000 cultural organisations in existence. The cultural sector plays a huge role in the economic recovery of the country ie 'softpower' in the UK and externally post Brexit.

Upcoming big events: Coventry City of Culture in 2021, 2022 is considered a big year for Cultural renewal with the Commonwealth Games, Platinum Jubilee, 75 anniversary of the Edinburgh Festivals, Festival UK 2022 (announced this week) – which NM hopes Oxfordshire will bid to be a hosting consortia (worth £100k of seed money – then if chosen to be in the final 10 projects - £10 million is then allocated). (Oxfordshire could explore a consortia of the Universities, Harwell, with cultural organisations). Applications initially due by the end of October 2020.

JH thanked NM for his time and insights. JH raised a few points, queries:

- Festival 2022 is on our radar and we are looking into applying
- Will the Furlough scheme be extended beyond October?
- How can Government do the Comprehensive Spending Review (CSR) in this current climate?

NM said there is no indication from Treasury on an extension.

The CSR is definitely happening, alongside preparing for Brexit.

HS thanked NM for all his valuable work. On social media, it is still portrayed that despite the £1.57 billion, the sector is going under. However, the funding hasn't been allocated out as yet. We need to keep sharing good news stories in relation to funding and how it has helped secure organisations. The £160 million will get the sector to October, the £1.57 billion through to April 21, then the CSR will get us beyond that. It is essential to maintain positivity to gain a better output from CSR. It is also recognised that LA's are now having to make cuts to arts and culture projects (ie Cherwell).

MM raised her concerns over the abolishing of VAT redemption. This will lead to Bicester Village needing to possibly reduce opening hours and/or employment numbers.

MM described that Bicester Village usually has 7.2 million visitors yearly and that tourism and the arts are intrinsically linked. Currently there are zero tourists, there is an increase in domestic visitors yet the difference in spend is huge. Generally Bicester Village is down 30-40% in visitation. China is doing much better. In Europe, the tax agreement may benefit some of these.

NM asked MM to share information with regards this.

MM

LS responded to NM's enquiry as to which Oxfordshire Museums have applied for emergency funding. GLAM haven't applied as they have been supported by the University. They are also exploring COVID 19 research funding (i.e. UKRI) and have received some funding already for research (£0.25 million towards research on the impact of isolation on older people related to culture, and additional funds to research mental health and young people and engagement

	<p>with GLAM's digital assets at the Ashmolean and the History of Science Museum. LS offered to share good news stories.</p> <p>NM echoed the importance of good news stories being shared.</p> <p>HBG advised NM on Experience Oxfordshire (EO) and how the DMO infrastructure across England is at risk at the moment. When EO was set up it was 100% funded. They were at 95% earned income yet the usual income streams aren't there during COVID. 5,000 business support requests came in during lockdown. EO isn't able to access any emergency or covid funds as a DMO. There is a paper at government suggesting amends be made to the DMO structure, to ensure survival and support for the visitor economy businesses. HBG offered to share the paper with NM.</p> <p>KO and VM both shared an update on the Schwarzmann Building.</p> <p>KO updated that there is still no physical building, they are at the end of RIBA stage one with an outline design and have appointed Hopkins Architects. They are also looking to appoint a landscape architect recognising the key role of the outside space and ensuring sustainable accessibility. Plans include space for students and staff, a library, a 500 seat concert hall, a black box experimental space, rehearsal space, and public engagement space for schools and the community both indoor and outdoor usage. Pre-application discussions have begun with the planners. An online consultation and exhibition will happen in the coming months. The original temporary Big Tent didn't happen. Post Christmas, a more formal consultation will take place with the aim to go for planning consent July 21.</p> <p>VM took the 'Big Tent ideas (the Cultural Programme) all online. The 18 events had a global reach in 23 countries and received 23,000 views. (The physical tent had hoped for 2-3,000 visitors.) Feedback included how the events assisted audience well-being.</p> <p>The team are also doing more engagement opportunities, i.e. connecting with Cultural Partners to assist them with either team support or funding. Examples include the Kindness Wave (ARK T), the Young Womens Music Project, and with other local museums.</p> <p>The team are also engaged with the upcoming City Light project, and the National Festival of the Humanities.</p> <p>Katy Mitchell, Opera and Theatre Director, is now a resident Fellow.</p> <p>JH thanked both KO and VM for their updates and the information on the exciting cultural projects that are underway.</p> <p>JH raised that a smaller Arts Working Group will be formed to drive next steps and invited NM's guidance and expertise to support this group.</p>	<p>LS ALL</p> <p>HBG</p> <p>JH/HRW/AG</p>
<p>4.</p>	<p>Creative Industries National Update</p> <p>This item did not go ahead due to technical difficulties. Please see the additional note prepared by John Newbiggin on the Creative Industries Council Regions and Clusters working group.</p> <p>JH thanked NM for his time and for his hugely valuable inputs to the meeting.</p> <p>NM left the meeting</p>	<p>JN</p>
<p>5.</p>	<p>Oxfordshire Economic Recovery Plan- Visitor Economy Insight consultation led by Jody Tableporter from Steer.</p>	

JT joined the meeting.
JT introduced this section explaining that the aim of the meeting is to gather early insights from the CVESG sub-group on the current and anticipated challenges posed by COVID-19 to the Visitor Economy as described in the previously circulated briefing note. These important qualitative insights will be set alongside the quantitative data analyses that Steer-ED/CE are progressing to give a full picture of Oxfordshire's economy, and inform an initial economic baseline assessment to be submitted to the OxLEP Board on 29 September. This is one of eight sessions with leaders and influencers; other sessions include: Business Growth and Supply Chains; Green Recovery; Inclusive Growth; Rural Economy; Strategic Sites and clusters; Town Centres; and Skills.

JT - Where/how has COVID-19 impacted on the Visitor Economy already? What is the reason for this impact ?

HBG opened the discussion highlighting the survey EO conducted in April/May. Findings included £138 million losses monthly by the visitor economy in Oxfordshire, 92% were reliant on furlough, and 45% reported that they didn't think they could operate past the next quarter. A major loss of forward bookings was also reported. Normally the visitor economy is worth £2.3 billion annually with 40% being from the inbound market. Intel suggests that Inbound won't return until 2024 (Visit Britain). This means it is a much slower recovery than anticipated. Phased opening and changing rules for businesses have delayed efficiencies on reopening/restart. There is still unprecedented low occupancy levels (15-20%) with city being worse hit than county. August saw some midweek occupancy increases and at weekends 70% achieved. High end properties are doing better, budget to mid are hardest hit. Attractions are operating at a third of capacity and losing money, and pre-booking is causing issues (loss of spend on site, people not showing up). The advice to not use public transport has hit numbers that would usually arrive via these means. City footfall is a third of what it was this time last year. Eat out to Help out scheme gave a massive boost across the county and some businesses are continuing it. Retail across the county is seeing footfall down, yet spend is up - nowhere near previous levels. 50% job losses of the 40,000 employed in the visitor economy is anticipated and loss of over 50% of the £2.3 billion revenue. 30% of businesses have still not reopened. All of this highlights the devastating impact for the sector. The recent 'rule of six' is an added complication.

HBG to share intel and data sets with JT.

HBG

MM described three key issues at Bicester Village due to COVID: safety, confidence, and decrease in spend. Big investments have been made at Bicester Village with regards ensuring safety (thermal scanners, apps, signage etc). Implementing social distancing has reduced the capacity of Bicester Village, even though it is partly outdoors. Another potential threat is having a young workforce so a spike could impact staff levels. Footfall is down due to no tourists, domestic visitors have increased yet spend is down (e.g. a domestic visitor spends £80-100 on average and an international visitor spends around £1,000).

JF joined the meeting.

BP mentioned that the city council was seeing a huge decrease in income from reduced car parking in the city.

JT - What do you anticipate for Visitor Economy impacts as you look forward three years? (Return to 'broad normal', a somewhat 'new normal', a fundamental 'new normal').

MM mentioned about inbound visitor numbers not recovering until 2024. HBG again reiterated that recovery is much slower than anyone anticipated seeing at least 3 years to be at pre-COVID levels. An additional challenge will be survival until that point.

JT - what will 2024 look like – ie. more retail, adapted business models?

HBG said this is too difficult to know at this stage. Business owners may know more.

MM said Chiltern Railways had reported passenger numbers being 90% down and that generally habits of travel are changing, and questioned whether commuting is dead? The perception of public transport is also impacting the choice to travel. Digital/online shopping is more frequented than physical retail venues.

JT asked are town centres being visited?

JH - these questions are so huge, the group can only give thoughts and feelings.

LS – also suggested that the questions are complex and multi-led and require multiple conversations with various partners to unwrap all of this. ie. LS mentioned a Department store in North Oxfordshire has closed down and a group of cultural organisations are looking to open a cultural hub in its place.

JN – The Towns Fund is seeing some interesting projects coming forward with regards to placemaking. Alongside the High Street Fund. Re-thinking High Streets as a social as well as a commercial function is ever more important.

JT - Are there other Themes that are influencing (positively or negatively) the nature of the COVID-19 impacts being experienced in the Visitor Economy arena? In addition to Town Centres?

RB – National Heritage Lottery are also managing COVID recovery funds and have had discussions with heritage organisations (land, battle, heritage) who have reported restrictions in opening, and at sites, massively reduced numbers of visitors. Many venues have reopened to fulfil a social function. Nature sites have had major increases in footfall and some of this has led to misuse at sites

leading to other issues. Visitors are different and not spending or engaging in places like before (**JT- to be picked up in the rural theme**).

KM – Local impacts include only 24 of 44 libraries/museums have reopened and overall a 76% reduction in footfall since reopening. There is a big cost involved in making spaces safe. Are we now heading into more of a digital age?

AG – Status quo is not going to happen – what are the new practices/new approaches across the Visitor Economy that we can perhaps trial/test/lead on? i.e. linked to customer experience, new tech etc. With regards inclusive growth – The Visitor Economy provides vital entry level jobs alongside jobs for young people, working families, and roles for women.

ALL

MM - the return to the car has heightened, and park and ride usage will increase. Future planning for space will be key.

JT – are there digital/online impacts on the visitor economy. What best practice examples can be shared?

JH – event organisers are being very creative to return and regain visitors. Many seem to see this as a short term solution and not that this is a permanent change. The ideas, i.e. outdoor drive in cinemas aren't long term earning mechanisms. Therefore new ideas in the events sector are needed with long term solutions being found.

HS – Short term solutions are leading to exclusivity (usually due to prices charged), we need to improve this situation, alongside decreasing reliance again on use of private cars.

JT – what would you ask Local Authorities (LA) to do to assist?

HS - Transport, parking, pricing are all linked, funding security is needed for organisations and the LA could assist with this and try not to do short term cuts.

JN – digital platforms have been well utilised, we need to think about how these can be monetized and distributed. We need to develop significant strategies. Instead of paying people not to work, pay people to work, i.e. use current funds (High Street) to commission work.

JT – how can we bring visitors back?

LLG – reminded the group of the substantial budget pressures that LA are facing with the additional costs linked to COVID (£60 million).

LS – 45% of audiences were previously international tourists. Now looking to reframe the offer to attract a local audience to assist with well-being etc. Also the university are actively applying for Covid related research funds.

JT- any postivies coming out in relation to COVID?

	JH/AG/HRW to consider replacements and to ensure suitable and appropriate representation of the various sectors on the sub-group.	JH/AG/HRW
7.	<p>Dates of next meetings:</p> <p>Monday 23rd November 10.00-12.00 OXLEP Boardroom tbc</p> <p><i>Electronic invitations have gone out</i></p>	

DRAFT