



Experience
OXFORDSHIRE
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OXFORDSHIRE'S VISITOR ECONOMY: COVID-19 BUSINESS IMPACT STUDY

A REPORT BY EXPERIENCE OXFORDSHIRE

www.experienceoxfordshire.org/partner

DATA COLLECTED BETWEEN 4TH AND 20TH APRIL 2020

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EXECUTIVE SUMMARY

The Covid-19 virus and the associated measures taken to control the pandemic have resulted in an ongoing shutdown of the tourism and wider visitor economy sectors, both for international and domestic visits.

The total annual value of the visitor economy to Oxfordshire last year stood at £2.28 billion, and the sector supports nearly 39,000 jobs – accounting for 11% of all employment in the county.

Experience Oxfordshire, the official Destination Management Organisation (DMO) for Oxfordshire, conducted a survey of over 100 visitor economy businesses across Oxfordshire, to discover the impact this is having on visitor economy businesses.

The findings suggest that in the first two months of lockdown (March-April), reduction in spend from tourism related activity has resulted in losses to the Oxfordshire economy of more than £225m, with additional losses of between £112.5m and £137.5m each month the lockdown continues, with losses rising further as we proceed through the year into the peak visitor spend period of May-August.

72% of Visitor Economy businesses have closed down entirely, with the remainder operating a skeleton staff for maintenance, or accommodating NHS workers during the emergency.

Over a third of businesses have been unable to retain their staff, with most furloughing between three quarters and all of their workforce.

Government support provided for businesses to furlough employees has been taken up and well received, allowing businesses to retain an experienced workforce ready for a time when social distancing restrictions are relaxed. However, take up of other Government support outside of furloughing has been indifferent in the main with only around half the businesses accessing VAT Deferral and the Job Retention Scheme, and as little as a third looking at Cash Grants and Business Rate Holidays; suggesting a need for more focussed communication of these options across businesses in the county. There also appears to be a significant problem in the sector where the bespoke operating conditions of many businesses mean that they fall outside of the scope of the current Government Support initiatives either through their size or seasonality. 22% of respondents fell into this category and more work needs to be undertaken to identify clear channels of support that could make a real difference in these areas.

The sales cycle for much of the visitor economy is prolonged, particularly for the more lucrative overnight stay market, with bookings typically being made 3-6 months in advance of

arrival. With no certainty of when travel will be possible again, businesses have seen significant cancellations of their forward bookings for the next two quarters and beyond. 74% of businesses have experienced cancellations of at least a quarter of their forward bookings, with 60% reporting more than half their bookings cancelled and 38% losing between 75% and 100% of their forward business.

Beyond immediate business interruption, the sector also faces a difficult path toward recovery. Unlike many industries, where economic damage is being caused by customers' reduced ability to purchase due to lockdown, Visitor Economy businesses face a prolonged period of reduced desire to purchase following the lockdown phase, as the nature of the sector is to promote novel social gatherings and is almost entirely place dependent and as such, a contagion risk. As a result consumer confidence in the sector will remain depressed for a prolonged period after restrictions are eased, and so the release from lockdown will not bring rapid financial relief to the industry.

As a result, even with the government support schemes currently in place, 74% of businesses report that they will have to permanently close within 6 months, under current operating conditions, and 45% do not expect to be able to survive for as much as 3 months.

Given the overwhelming reliance on the furlough scheme in particular to retain staff, the 39,000 jobs the visitor economy sector in Oxfordshire supports are inevitably at significant risk, should the scheme come to an end before customers return in significant numbers.

Additional financial lifelines will be required if Oxfordshire is to have a viable, competitive and fit for trade Visitor Economy in the county post Covid-19.

INTRODUCTION

The coronavirus outbreak is first and foremost a human tragedy, but it is also having a growing impact on the global economy. Oxfordshire's visitor economy is no exception, and the aim of this study is to provide an initial analysis of the effect of the outbreak and subsequent lockdown on visitor economy businesses across the county. The healthcare and political situation is moving quickly, and some of the perspectives in this study may fall rapidly out of date. This document reflects our understanding as of April 25, 2020. We will update it the situation evolves.

STUDY AUTHORS EXPERIENCE OXFORDSHIRE

This survey was conducted by Experience Oxfordshire, the official Destination Management Organisation (DMO) for Oxfordshire and trading arm of the parent charity, the Experience Oxfordshire Charitable Trust. We are a not-for-profit partnership organisation that is committed to the promotion, management and development of Oxfordshire as a great destination to live, work, visit and do business.

We work with businesses and stakeholders to improve growth and productivity across the visitor economy and lead Destination Management across the County, whilst ensuring that tourism works for everyone across Oxfordshire. We have a growing Partnership of businesses spanning all parts of the visitor economy and through effective collaboration work to ensure that Oxfordshire is a world-renowned destination of choice for tourism, culture and business.

During the current crisis, we are continually monitoring the impact of Covid-19 on Oxfordshire's Visitor Economy, reporting back to local and national agencies to help us lobby for more support for the sector.

We are also working to disseminate information from national agencies to local Visitor Economy businesses and provide advice on where to access funding and support.

We continue to promote Oxfordshire during this extraordinary time, using our consumer messaging platforms to promote support for local businesses and encourage our audience to plan visits for the future through various calls to action such as our #DreamOxfordshire campaign.

THE OXFORDSHIRE VISITOR ECONOMY

The total annual value of the visitor economy to Oxfordshire last year stood at £2.28 billion. We welcomed nearly 30 million visitors to the County and the sector supported nearly 39,000 jobs – accounting for 11% of all employment, and, until the pandemic, enjoying a 5% year on year growth for each of the past 5 years.

Almost half (£960 million) of this value was generated from overnight stays, of which £322 million was spent by guests from overseas. [The nationality of day visitors is not recorded].

The visitor economy is also very seasonal, with 60% of all overnight stays taking place between April and August, making the timing of the lockdown particularly damaging to this sector.

KEY FINDINGS

IMPACT ON BUSINESS: REVENUE

- 85% of businesses reported a reduction of at least 50% in their current revenues
- 74% of businesses have experienced cancellations of at least a quarter of their forward bookings
- 60% of businesses have seen more than half their forward business cancelled
- 38% of businesses have reported cancellations of between 75% and 100%
- Lost tourism business is estimated to be losing the county between £112.5m - £137.5m per month
- 72% of businesses have had to close their business down altogether

IMPACT ON BUSINESS STAFFING AND JOBS

- 34% of businesses have not been able to retain all their staff, with 71% of these losing between three quarters and all of their staff.
- 92% of affected businesses are relying on Furloughing to retain some or all of their workforce.

IMPACT ON BUSINESS FINANCE / ACCESS TO GOVERNMENT SUPPORT

- 46% report that they are experiencing cash flow problems
- Only 22% of these have been able to call the HMRC Time to Pay helpline to date
- Only one third (34%) of businesses have discussed COVID loans with their banks
- Of government support initiatives, the most helpful to the sector are: Furloughing (78%), VAT deferral (48%) and the Business Rates Holiday (35%)
- Of government support initiatives, the least helpful to the sector have been Sick Pay & Income Tax Deferral (both 11%) and the CBILS initiative (12%)

- Even with the support schemes currently operating, 74% of businesses report that they will have to permanently close within 6 months, under current operating conditions.
- 45% report that they will permanently close within 3 months.

ADDITIONAL SUPPORT REQUIRED NOW

Financial Support

- Businesses require access to funds already allocated by government but not yet awarded
- Extension to the duration of government support schemes
- Adaptation of the Furlough Scheme to allow working on reduced hours during recovery
- Additional financial support for self-employed, contract, seasonal and freelance workers

Strategic Support

- Clarity on timescales and phases of social distancing for the remainder of the year, in order to prepare business plans.
- Advocacy for the sector, to ensure government understand the impact on business.
- Recognition / Support around the particular damage to seasonal businesses.
- Destination marketing to promote confidence and ultimately bring in customers.
- Co-ordinated planning to rebuild demand by restoring public confidence.
- Guidance on hygiene and social distancing measures for visitor safety and comfort.

ADDITIONAL SUPPORT REQUIRED IN THE FUTURE

- Destination marketing to promote confidence bring in customers.
- Advice and support to redirect sales strategies to focus on domestic bookings.
- Support during the phased recovery (6-12 months) , including funding to allow business to prepare and adapt.
- Support during the 'legacy' period while demand remains suppressed (12-24 months)

ADAPTATION & RECOVERY

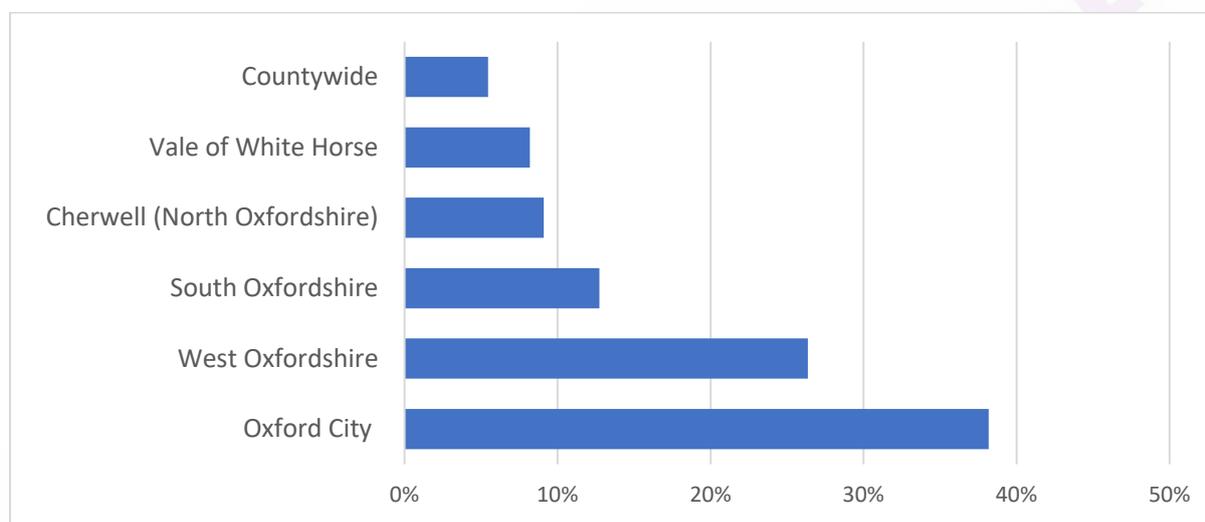
For the Visitor Economy sector, Adaptation and Recovery remain in the future. Unlike many industries, where economic damage is being caused by customers' reduced *ability* to purchase due to lockdown, Visitor Economy businesses face a prolonged period of reduced *desire* to purchase following the lockdown phase, as the nature of the sector is to promote novel social gatherings and is almost entirely place dependant and as such, a contagion risk. As a result consumer confidence in the sector will remain depressed for a prolonged period after restrictions are eased.

OXFORDSHIRE VISITOR ECONOMY: RESPONDING BUSINESSES

Study participants

Visitor Economy Businesses from across the county were invited to participate in an online survey available between 4th April and 21st April 2020. Over 100 businesses responded –ranging from major retail hubs, hotels and transit networks to independent tour guides, restaurants and local attractions. Participants were able to provide data anonymously, though the majority chose to identify themselves.

Location of responders by Local Authority Area



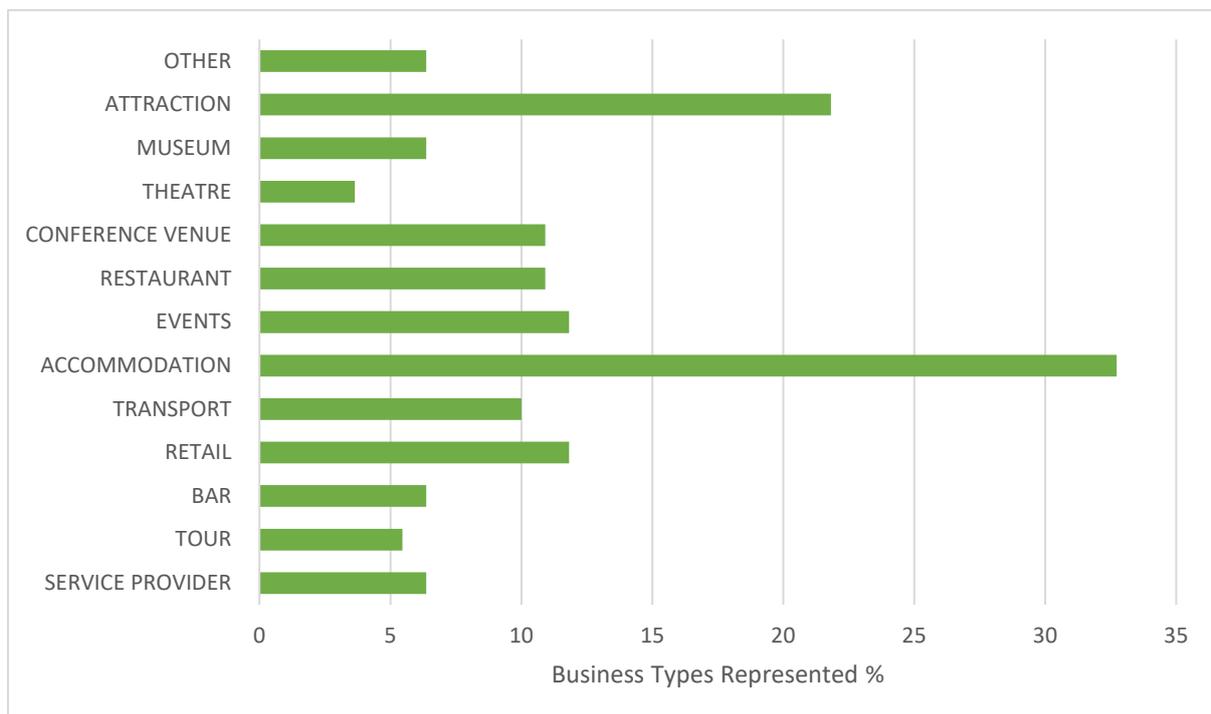
Do you operate in leisure or business tourism?

Leisure only	33%
Business only	7%
Both	60%

Which markets do you operate in?

International only	3%
Domestic only	32%
Both	65%

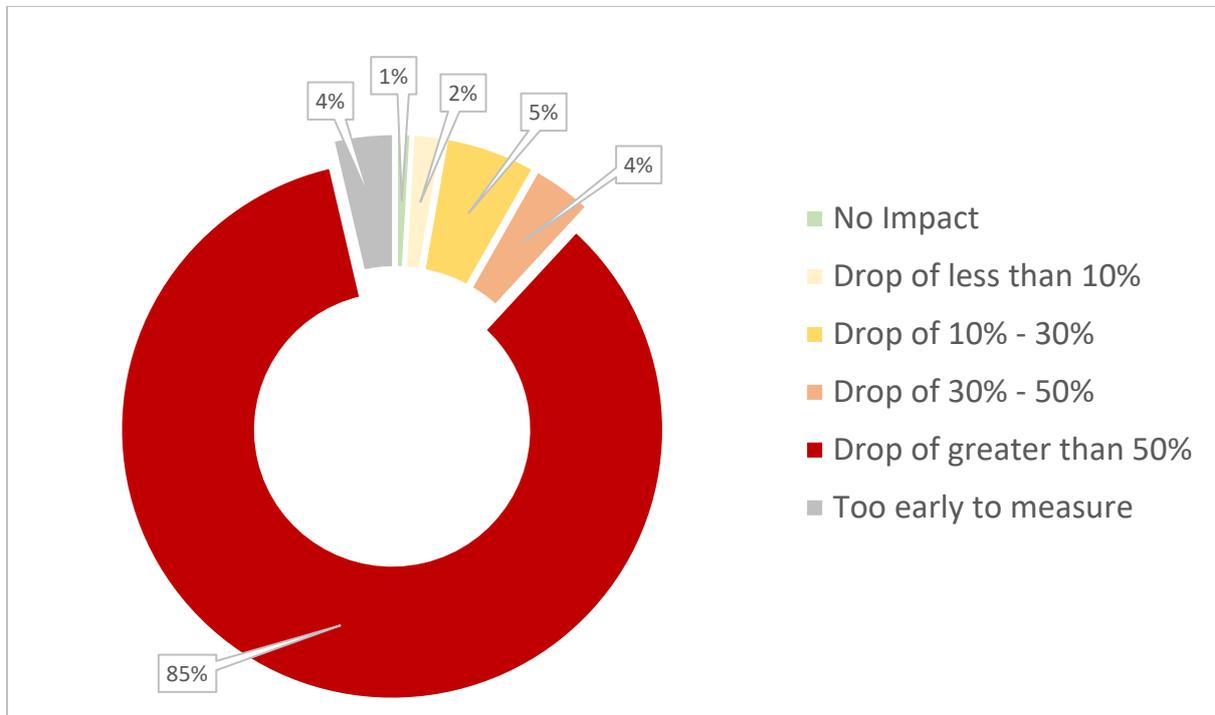
Percentage of responders by business type



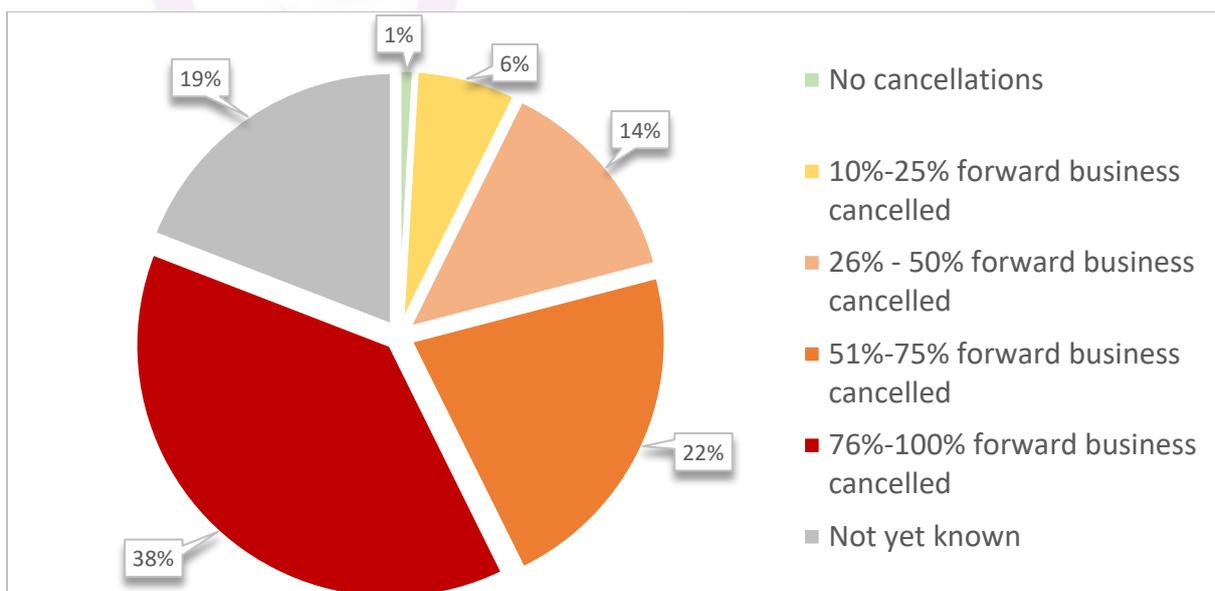
Some businesses have operations spanning several business types, so total exceeds 100%

IMPACT ON BUSINESS: REVENUE

Impact on businesses' current revenues

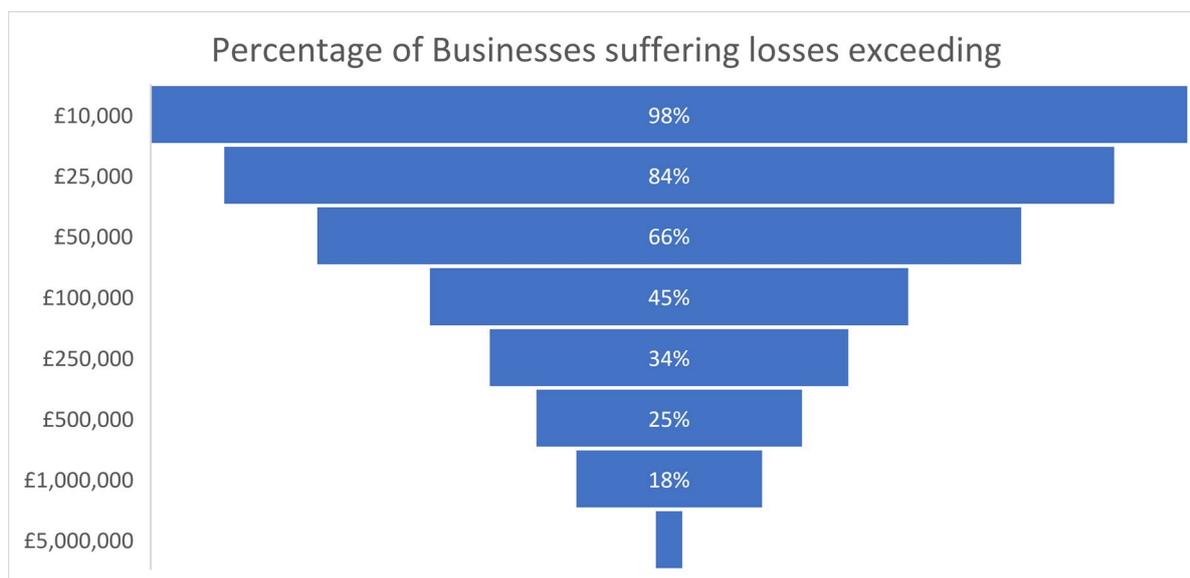


Impact on forward business



What is the anticipated amount of revenue in £ that companies have lost/will lose as a result of Covid-19 in March and April?

Figures are for the period March-April 2020



Reported revenue losses ranged from £6,000 to £12.5m in this 2 month period.

Our dataset for this response represents approximately 4% of the known 2,000 Oxfordshire visitor economy businesses.

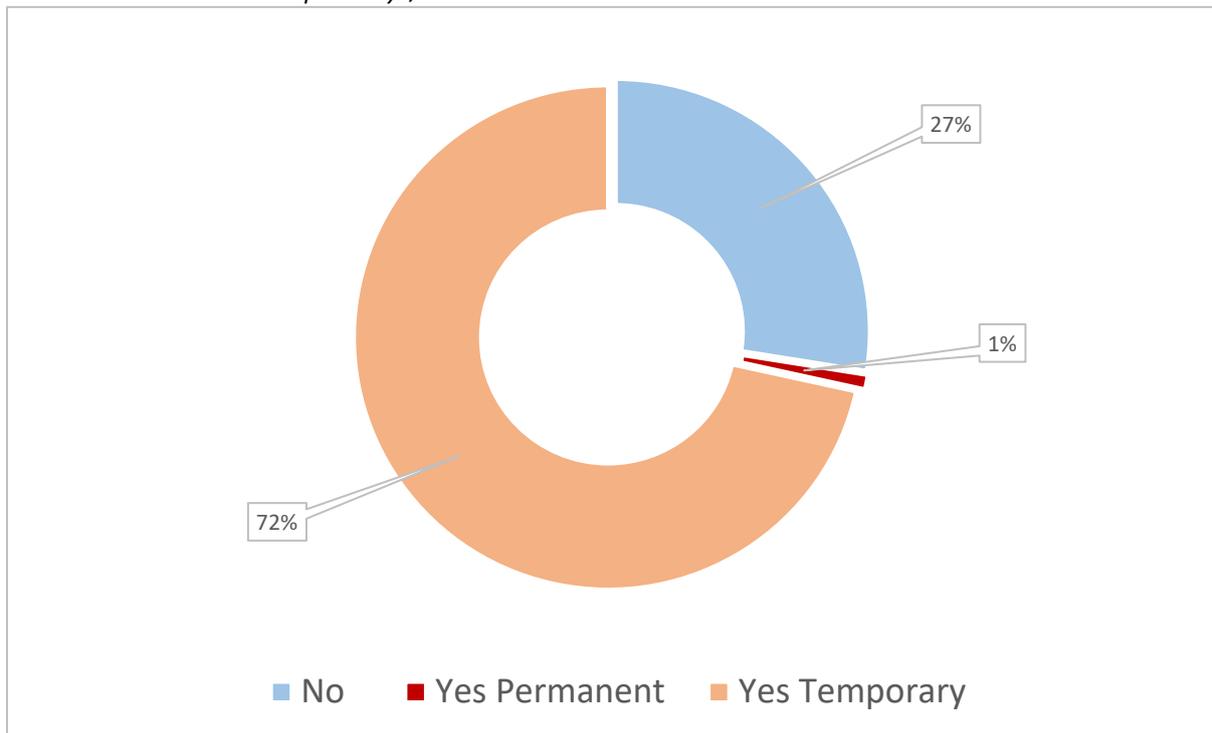
The mean loss per month (excluding the outlier £12.5m firm) evaluates to £271,300

The median loss per month evaluates to £50,000

We therefore estimate that losses to the Oxfordshire visitor economy from direct spend as result of COVID19 are currently running at between £80m and £120m. Including the multiplier effect of induced spending as a result of tourism related activity, the loss to the Oxfordshire economy is estimated at £112.5m - £137.5m each month, with monthly losses rising further as we proceed through the year into the peak visitor spend period of May-August.

Have you had to close your business down?

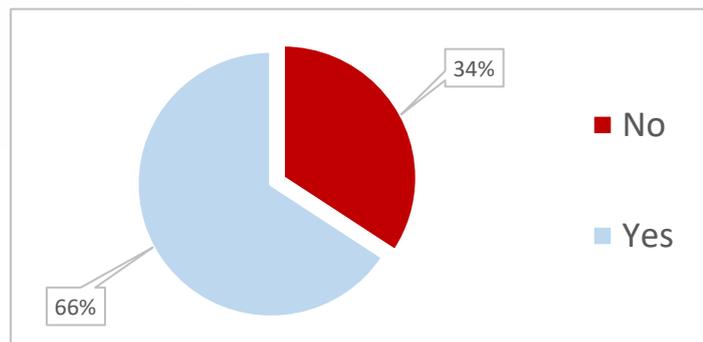
Is the closure – Temporary / Permanent?



IMPACT ON BUSINESS STAFFING AND JOBS

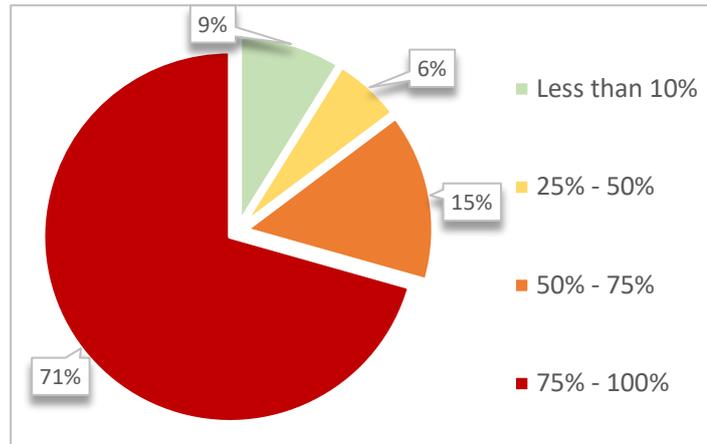
Have businesses been able to retain all their staff?

Response	Percentage
No	34%
Yes	66%



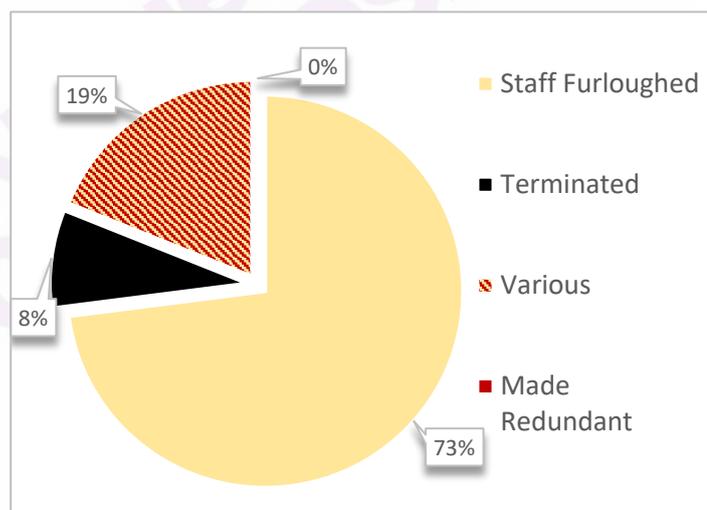
For those companies who have had to lose staff, what percentage of the workforce has been lost to date?

Response	Percentage
Less than 10%	9%
25% - 50%	6%
50% - 75%	15%
75% - 100%	71%



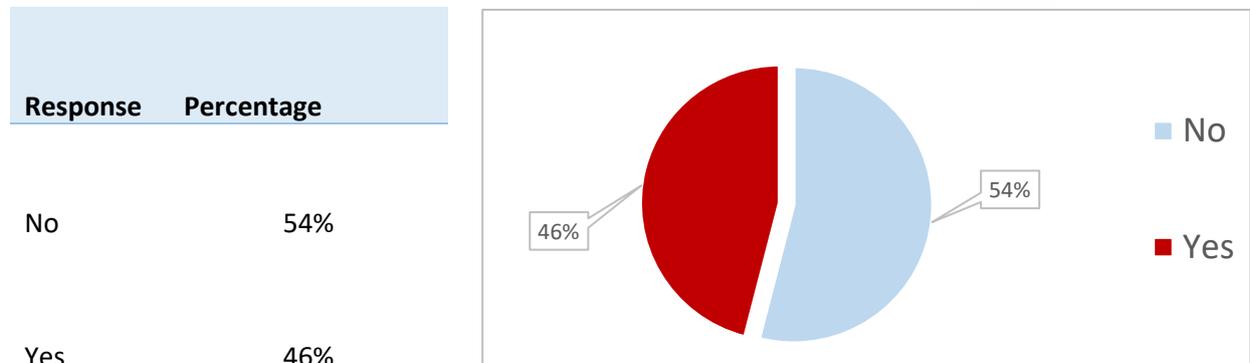
Of staff lost, what form has this taken

Response	Percentage
Staff Furloughed	73%
Terminated	8%
Various	19%
Made Redundant	0%

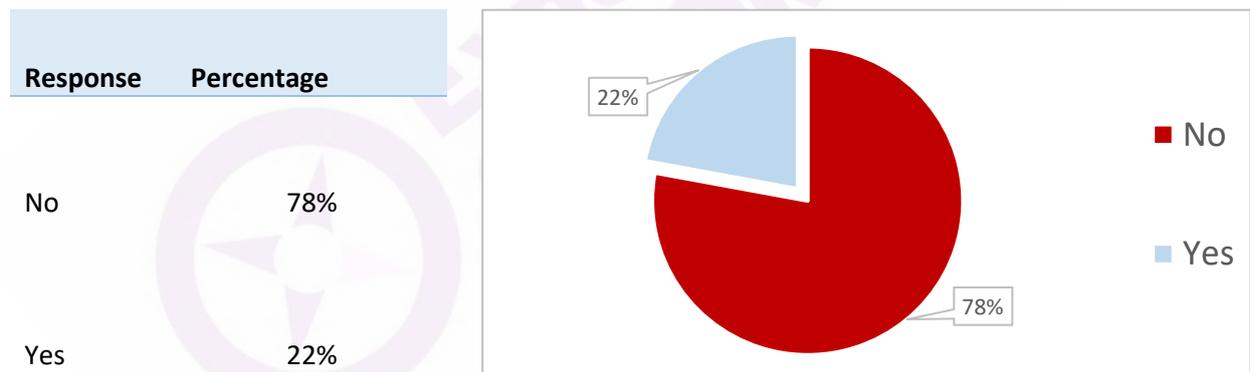


IMPACT ON BUSINESS FINANCE / ACCESS TO GOVERNMENT SUPPORT

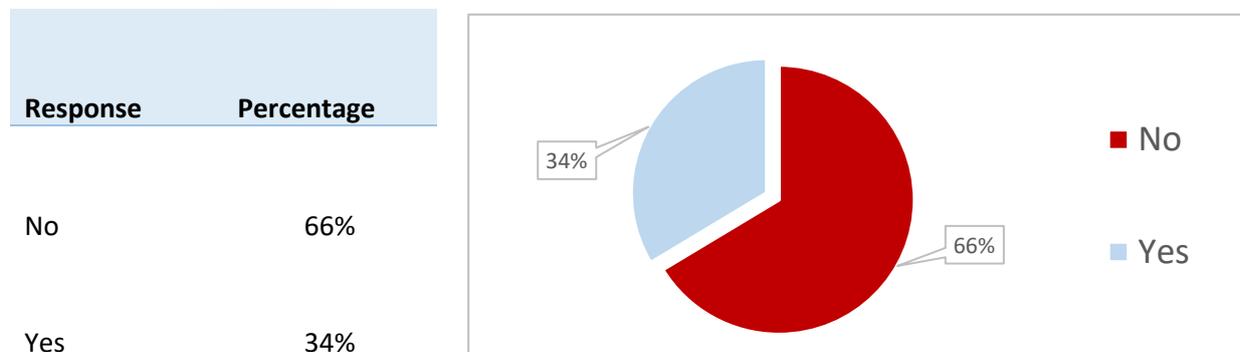
Are Oxfordshire companies experiencing cash flow problems?



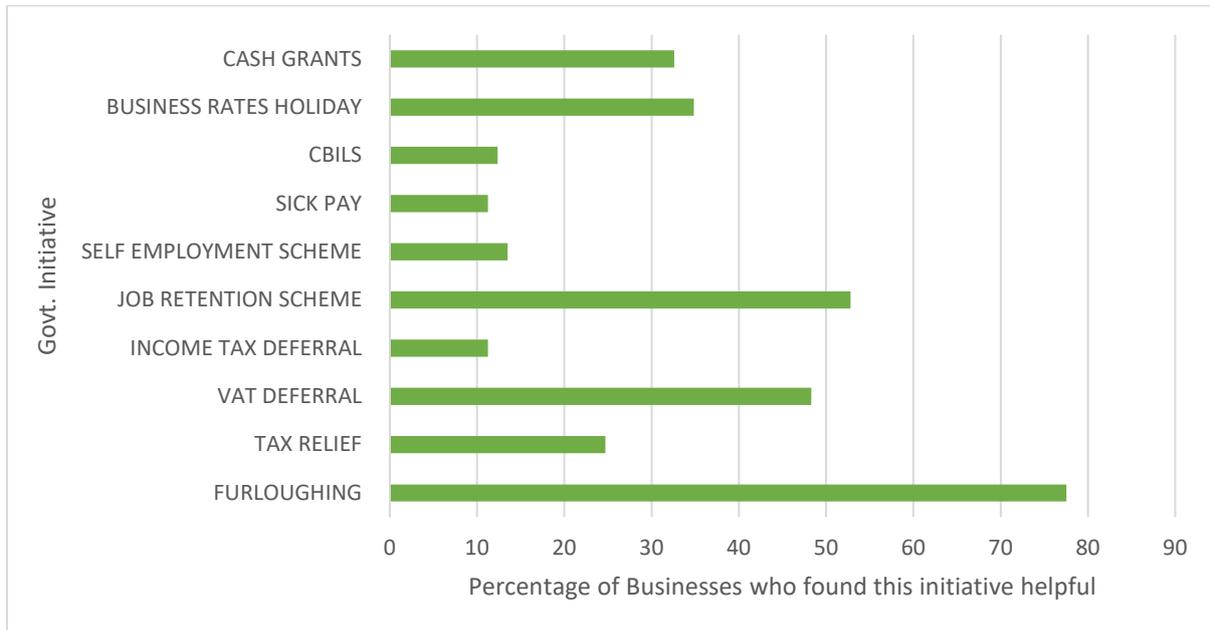
Have companies experiencing problems been able to call HMRC's Time to Pay helpline?



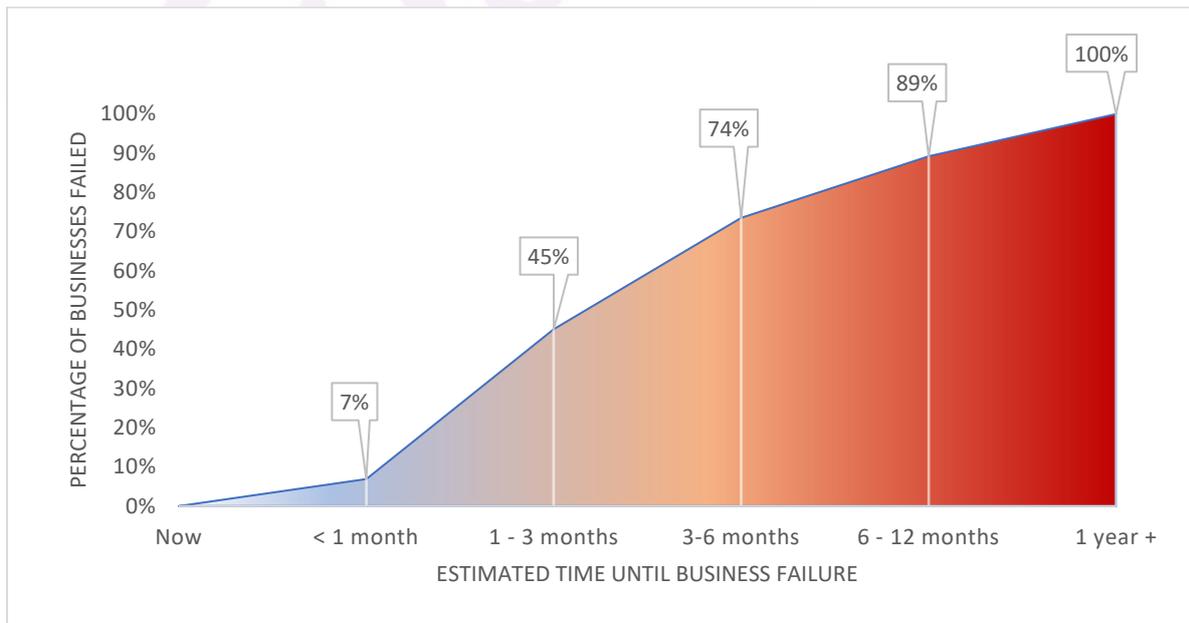
Have companies discussed the new COVID loans with their banks?



Which government initiatives have been helpful to Oxfordshire businesses?

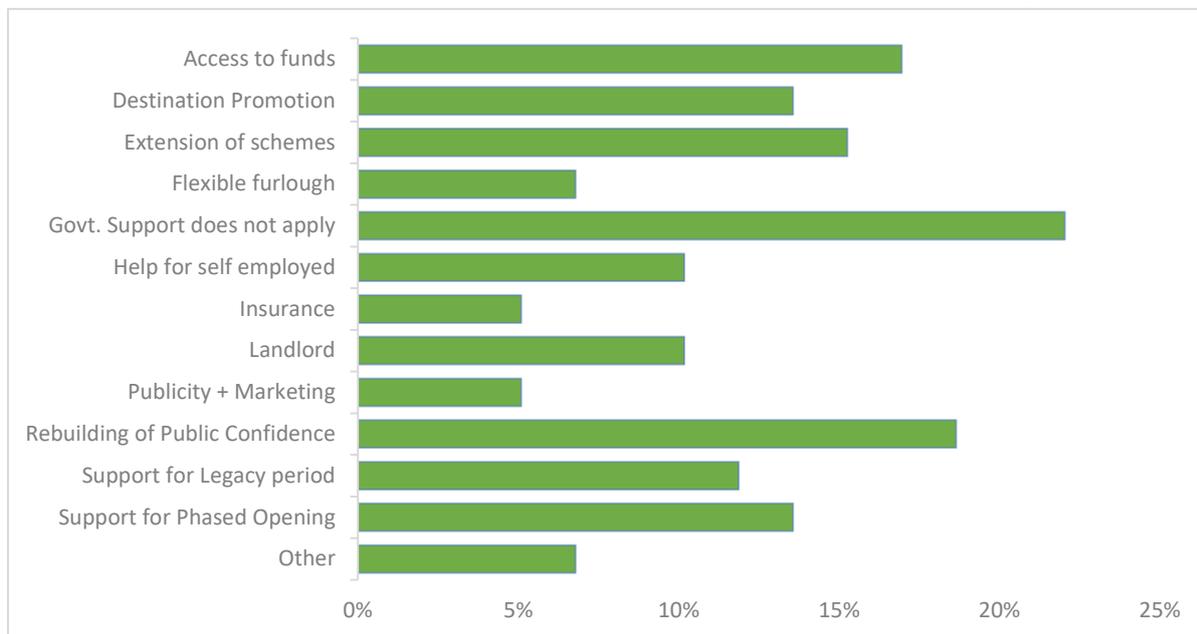


Taking account of existing government support you may have received or be about to receive, how long until businesses in the current “lock-down” climate fail without additional financial support?



What other support would you need to help your business to continue to operate now and in the future?

59% of businesses provided narrative accounts of what further support they needed. Several areas of concern were flagged by a significant number of respondents. These are detailed below



Access to Funds

17% of businesses reported difficulty receiving emergency funds, either from the government initiatives above, or from banks.

We are having cash flow problems because the grant and furlough money still hasn't come through so it would be helpful if the money was quicker to come through. We asked our bank for an overdraft facility and it was agreed over 6 weeks ago but it still hasn't been implemented.

Restaurant

Destination Promotion

14% of businesses highlighted a need for a strategic approach to promoting Oxfordshire again once restrictions are eased.

Oxford will need a huge PR effort to position itself again as a key destination for tourism. There is increased hotel supply and not enough business to go around.

Accommodation

Extension of Schemes

15% of businesses suggested that extending the duration of the Government's current initiatives would be critical. Furloughing in particular was a concern, as well as the Job Retention Scheme and, for applicable businesses, Arts Council England's funding.

We need the 'COVID-19 BUS SERVICES SUPPORT GRANT' to continue beyond the 12 weeks announced on Friday 3 April for as long as demand is reduced.

Transport

Arts project funding and National Lottery funding above and beyond that which has been diverted to Covid emergency funding.

Events

We need the furlough scheme to continue for as long as possible. We are in the business of mass gatherings so public confidence will take a long time to be strong enough for us to reopen.

Theatre

Flexible Furlough

7% of businesses suggested a need for more flexibility in the Furlough scheme, to enable them to operate key security and maintenance functions at reduced levels while their businesses are otherwise closed.

Partial furloughing for staff whose roles have greatly reduced but still have responsibilities - e.g. building managers.

Theatre

It would be hugely helpful to be able to furlough part of a job role. We are such a small business that in the current set up we either have a Marketing department or no marketing department at all (for example), as we have no team only a single person in each department.

Attraction

The ability to have staff working reduced hours or for staff to work voluntarily whilst on furlough (we are a Charity). Some staff could do a limited amount from home (and want to help) however furloughing rules prevent them from doing anything at all to help the Charity - which is very frustrating for a committed team of staff.

Attraction

Government Support Does Not Apply

This appears to be a significant problem for our sector, with the highest number (22%) of respondents citing this as a key area where further support is needed.

The bespoke operating conditions of many companies in the Visitor Economy sector mean that many of our businesses fall outside the scope of government support initiatives, either through small size, seasonality, or relying on an itinerant workforce.

Reported circumstances include:

- Furloughing does not factor dividends into the income of business directors, often working to a nominal salary
- Museums not qualifying for the Retail, Hospitality and Leisure sector support schemes
- Lack of support for businesses who pay licence fees rather than business rates (boating, private hire vehicles etc)
- Need for recognition of increased impact on seasonal businesses where the current months (Spring and Summer) are the only profitable periods
- Small Business Rates Relief recipients being disqualified for Hospitality and Leisure grants
- Conditions on existing EU grant funds which have been awarded but may expire before projects can complete.
- B&B accommodation providers who pay council tax rather than business rates excluded from support schemes
- Rateable Value criterion for cash grants for Retail, Hospitality and Leisure are too narrow for many Visitor Economy businesses – usually applicable only to shops.

Not been able to get the Hospitality & Leisure business grant because we have SBRR. Needs to be additional grants to seasonal tourism businesses such as ours that need to capture the important Easter/school holiday periods. If social distancing doesn't end before the summer, seasonal businesses will be entering another winter with no cash in the bank to get them through. This is a unique issue for outdoor/seasonal tourism businesses and has not yet been recognised by the Government. Extra help is needed urgently. Also the CBILS is hard to access, and banks not dealing with it quickly, so we have no idea whether we are going to be eligible.

Attraction

We are a B&B and now have no income at all. We pay council tax not business rates so have no help there. We made a loss so 80% of nothing is nothing. We can't get a business loan as can't pay it back. Our landlords say contact the government for help but universal credit won't pay their rent at £3000 per month.

Accommodation

Support for the Self Employed

10% of businesses highlighted a need for more support for the self-employed – both small business owners and freelancers – who make up a significant proportion of our sector’s workforce, particularly in the fields of arts and of tours.

Greater financial support through the self employment scheme to take into account reinvesting into my business and not calculating my income purely on net trading profit which is unrealistic.

Accommodation

Continued support for self employed workers to support the many freelance artists, managers and other workers in the cultural sector.

Events

Rebuilding of Public Confidence

19% of businesses looked to the future and stressed the importance of rebuilding public confidence to participate in travel, tourism and cultural activity, through a co-ordinated public relations campaign, as well as clarity and guidance on hygiene and social distancing measures adopted by visitor economy businesses.

The confidence of the public that, once this is over, everything and everywhere is safe.

Accommodation

Publicity campaign to encourage consumer confidence about going out for drinks/food/stays.

Restaurant

We are concerned that after museums are allowed to open, reluctance to travel, particularly by more senior citizens will remain so that we have insufficient visitors.

Museum

Support for Phased Reopening

14% of respondents considered the need for support and co-operation in managing the re-opening of Oxfordshire as a destination, in areas of operation including hygiene standards, crowd control, and restricted visitor capacity at attractions. Visitor Economy and leisure businesses have been identified by the government as amongst the last to reopen, as part of social distancing measures, so support will be needed for this sector for longer than many others. Businesses also stressed that they would expect to restart their operations gradually, with a reduced offer and reduced staffing, until demand for their services increased.

If re-opening involves a degree of restrictions on congregation of numbers and social distancing – it would be preferable to be explicit for reassurance for customers and staff.

A joined up approach on the re-opening of Oxford, marketing messages, will it be a staged re-opening, management of crowds. Input on council's strategy for re-opening re. traffic management, car parking etc.

Attraction

Co-ordination of major events and communications (eg venue re-openings so that we don't crowd each other out).

Museum

Grants to cover reduction in income when restrictions partially lifted or continued support with staff salaries when they are able to work but visitor numbers/revenue is reduced.

Museum

Support for Legacy Period

12% of businesses focused their answer even further ahead, noting that the pandemic will have altered customer behaviour, depressing demand for visitor economy services for a long period after social distancing measures are lifted.

Continued support beyond re-opening while confidence in participating in large gatherings recovers. This will be needed to support the sector for much longer than the period of closure.

Theatre

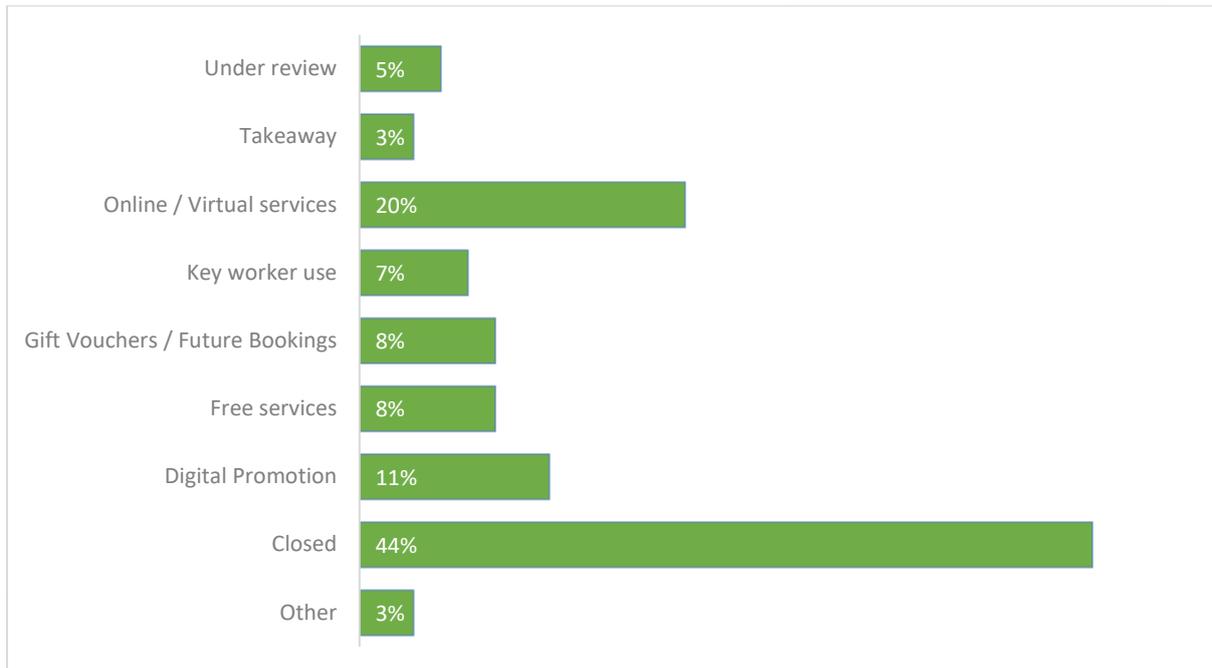
Support for those businesses that are unlikely to be able to host events, weddings etc for many months to come.

Attraction

ADAPTATION AND RECOVERY

If you have had to adapt your business model and service offering can you tell us what changes have you had to make?

Fewer than 50% of responding businesses were able to provide any answer to this question, and the majority who did only used it to confirm that their businesses were entirely closed, or that they did not know how to adapt.



Takeaway

Several restaurant businesses reported offering a takeaway or food delivery service for the first time, however, while much publicised in the initial days of the lockdown, and supported by relaxation on licencing, businesses have noted that the increased costs associated with delivery and with purchasing and preparing food for a drastically reduced demand means that such activities are not economically viable, and are operating these services as a social good or for customer retention purposes only.

Tried doing takeaway but did not work for us as we couldn't adapt quickly enough or manage demand.

Restaurant

Food collection business - more a service then profit-making operation

Restaurant

Online / Virtual Services

20% of businesses reported adapting their service offering by providing online or digital services, making this by far the most common adjustment. Oxfordshire's businesses have shown impressive adaptability and creativity in offering 'virtual' tours of premises, online arts workshops, classes and demonstrations, or adapting entire festivals to an online-only mode.

It should be noted however, that none of the businesses and charities surveyed reported any revenue-generation from this activity, instead providing these services as a social good, and to maintain contact with their customers.

Started offering online consultations to help people realise potential in their garden. Tailored our content to helping people use their free time to come up with things to do in their garden.

Attraction

We are developing a short, online tour to engage with our 'visitors'.

Attraction

Exhibitions will all be virtual until we return.

Attraction

We are offering what workshops we can online and will be putting out recordings of our previous in-house productions for people to watch at home.

Theatre

Online tours incorporating commentary and videos would be a way forward. But getting the material would involve breaking lockdown rules unfortunately.

Tour

Key Worker Use

7% of businesses, have switched their operations from guest services to providing services (accommodation, transport etc.) for NHS staff or other key workers during this crisis. Others are still looking to supply these services as a revenue stream, while several further report applying to provide services but being turned down as a result of rural location.

We have offered our resources to help transport NHS workers both locally and nationally.

Transport

Opened our self-catering accommodation for key workers only. Currently hosting NHS frontline staff at significantly reduced rates (64% discount off normal nightly rates).

Accommodation

Gift Vouchers / Future Bookings

Selling Gift Vouchers or offering these in lieu of refunds for cancelled services are common (8%) adaptations businesses have made – these have the advantages of providing business with cash flow, while not setting a date to provide the service. However, demand for this is not high, and requires stimulation by educating visitors on the need to support visitor attractions at the present time.

Companies are also of course continuing to search for future business, and taking bookings for later in the year, though at the risk of having to cancel these bookings again if restrictions aren't lifted. Booking of accommodation and other major spend items for leisure trips to Oxfordshire generally occurs between 6 months and 2 months in advance of a visit. Given peak season for visits is the summer, if bookings are not secured already or in the coming few weeks, significant future business will be lost.

We are selling gift vouchers for our tours and for customers who had booked a tour, we are offering to transfer their booking to a gift voucher to use in the future.

Tours

We are taking bookings for later in the year, but these enquiries are very few and far between. We are offering enhanced commission for our partners and also favourable cancellation terms to try and secure some bookings for late summer.

Accommodation

We have started to sell gift vouchers on our website. However, since the majority of our customers are based abroad, uncertainty about future travel means that uptake of this offer has been fairly poor.

Tours

Free Services

In addition to the online / virtual services being offered, a further 8% of companies are offering free deliveries where previously delivery was not offered. Some businesses are operating additional services beyond their normal offer on a pro bono basis, using the resources available to them.

We are offering free delivery on all stock to encourage people to purchase from us.

Retail

All staff furloughed so owner is taking grocery orders and fulfilling twice weekly.

Accommodation

We have started to offer free shopping delivers to those who are vulnerable and in isolation, this service is free for anyone over 65. We have also started a Go fund me

page to collect donations to give free taxis to NHS staff.

Transport

Digital Promotion

11% of responses focused on businesses increasing their use of social media, enhancing their websites and using crowdfunding. These businesses do not currently have a product or service they are able to sell, and so are using digital promotion purely to maintain customer awareness of the business ready for a return to operation.

We have adapted our website and social media channels to engage our audience while we are closed but we are a museum/tourist attraction so physically visiting the site is essential to experience the attraction.

Museum

Using social media to keep the venue in people's minds

Attraction

Other

One response from a distillery attraction explained that the company had switched from making gin, to making hand sanitiser. They are providing this at cost to other businesses rather than profiting from the activity.

What plans (if any) do you have for business recovery?

29% of businesses are aiming to make amendments to their business plan - for example by cost-cutting and revising hygiene and social distancing operations. Some businesses are focusing on marketing campaigns and promotions to encourage visitor awareness ready for reopening.

Significant cost cutting for the next 1 to 2 years. Reduced staff, reduced advertising, reduced capital investment, as we will have significant loans to pay off (if we survive and can access these loans).

Attraction

Review of the entire business model and operating costs to cut core expenditure after re-opening in anticipation of a 50-75% reduction in sales, with redundancies likely.

Theatre

A strong marketing campaign to show that we have survived and have improved our services. We have also undertaken staff training and have carried out some minor maintenance. Revising our understanding of guest expectations – hygiene, social distancing etc.

Accommodation

We will open a section of rooms at a time; reduce food offering and then increase/grow as business increases.

Accommodation

This is highly dependent on what re-opening looks like, but we will need to consider our different audience offers as expecting that the local and the most loyal visitors will be the first to return.

Attraction

We will drop our prices to try to get more business. Also up our email marketing and cut all possible outgoings. The hotel closure is over our busiest months which normally help to fund the bleak winter months so the next year will be crucial to our survival.

Accommodation

What support do you need in preparing for business recovery?

60% of respondents answered this question, with the overwhelming response being a plea for continued financial support.

Other key recurring themes from responses were:

- The need for clarity on timescales and phases of social distancing for the remainder of the year, in order to prepare a business plan.
- Destination marketing to promote confidence and ultimately bring in customers.
- Advocacy for the sector, to ensure government understand the impact on business.
- Recognition / Support around the particular damage to seasonal businesses.
- Support during the phased recovery, including funding to allow staff to return to the business from furloughing to prepare and adapt.
- Advice and support to redirect sales strategies to focus on domestic bookings.
- Advice and support to reconnect with potential visitors and enhance use of social media.

Clarity from the Government and City Council in re-opening and any restrictions on social distancing.

Attraction

Keep up the PR effort for the city as a key destination for leisure visitors so that we win over other popular destinations (Bath, Stratford etc). It is predicted that that recovery will be slower in the major cities (London, Dublin, Edinburgh) and again hopefully this will help our home county destination. We are starting to receive enquiries for tour / leisure groups for Spring 2021.

Accommodation

Aside from financial support we just need tourists to come back when this is all over!

Tours / Transport

Consistent voice from the sector, close working with govt to ensure impact is understood.

Attraction

Next winter is the biggest worry as we will potentially have had three winters in a row (the second winter being the lost summer 2020). We will need significant funding to get through winter 2020/2021 as we will not have built up our cash reserves through the summer that get us through the winter. At this stage we can see no possible way of surviving the next winter without significant grant support from the Government. I am sure many other seasonal tourism businesses will be in the same situation.

Attraction

RECOMMENDATIONS

Based on the data above and communication with other regional and national visitor economy representatives, we believe the following need to be resourced and actioned:

- Clear guidance for visitors around what it is safe to do and when – and reassurance that travel to and through Oxfordshire is both safe and welcome.
- As much notice as possible from government of when businesses will be allowed to re-open, so that preparations can be made.
- Longer term financial support for the industry, understanding the challenges posed by seasonality, ongoing restrictions on international travel, and long term reduced operating capacity of most businesses based on social distancing measures.
- Clear guidance on how best to protect staff and customers through adaptations to sites and use of PPE.
- Resourcing for a major marketing campaign focused on local and domestic visits.
- A strategic lead for the Oxfordshire Visitor Economy sector to ensure that standards of safety and security are consistent across Oxfordshire's tourism businesses, to enable a placemaking PR and marketing campaign reassuring visitors of Oxfordshire's ability to welcome them safely.

APPENDIX: ADDITIONAL COMMENTS PROVIDED

Experience Oxfordshire communication has been very helpful as I haven't received any direct notifications from government.

Accommodation

We are a good example of a small enterprise that supports other local business and charities, are a local family with skills in the dwindling heritage sector but fall between the gaps.

Accommodation

Government will need to put more pressure on insurance companies who had business interruption cover.

Accommodation

Any help/suggestions would be welcome

Restaurant

As part of the University we have a certain security, however we can't confirm new bookings until the University has decided what, exams, graduations etc they need to reschedule, as the students are the priority.

Conference Venue

We need to know about the JRS in fine detail and when we are getting the money and also if tips are included.

Restaurant

We have found some suppliers very helpful (including SSE, who have deferred payments). The banks have been slow, but I am hoping that help will be forthcoming in delaying payments/additional loans. Some other specialist lenders have been unwilling to support us in any way through delaying payments whilst we are closed, leaving us having to pay in full each month whilst we are closed.

Attraction

We are in the rare position of having no fixed costs to worry about so just look forward to starting up again in situ when we can.

Attraction

We are a charity, providing visits to community wind and solar farms. We are losing potential donations from visitors, but not our main income. However we are severely impacted in delivering our aims.

Attraction

The Treasury needs to ensure that SMEs can quickly access appropriate funds

Service Provider

Events in the cultural sector rely heavily on freelance artists and staff who don't fit neatly into one of the categories for support identified by the government. These are an important part of the national economy and are shown to have significant impact on health and wellbeing. Arts Council England has had to divert its project funding allocation to Covid emergency funding leaving those projects and artists who don't fit the limited criteria and amounts of the emergency funding without the prospect of funding for a year or more. This is a huge gap which needs to be filled.

Events

As a company we haven't lost a great deal. However, there are 950 artists, many self-employed, whom we represent and each year they turnover up to £1 million in art during the May festival. This will have been severely impacted. I would estimate it is almost entirely wiped out.

Events

I think the government's economic interventions have been fantastic!! Thanks.

Bar

We have only had to close down our retail offerings. Our construction teams and nursery are still working on a limited basis and within government guidelines of safe practice.

Attraction / Service Provider

We thank the Government and WODC for their prompt payment of 25,000. This will assist in paying suppliers and general costs. Promotion of tourism in the later part of the year would certainly help.

Retail

We have had to give our landlords termination notice of our office let as we can't afford the monthly rent.

Service Provider

Could do with a business consultant to help me look at options.

Service Provider

It is social distancing that is the main issue.

Conferencing Venue

Experience Oxfordshire
www.experienceoxfordshire.org

Experience Oxfordshire Venues
www.experienceoxfordshire.org/venues

Experience Oxfordshire Partnership
www.experienceoxfordshire.org/partner

Oxford Visitor Information Centre
www.experienceoxfordshire.org

Oxford Official Walking Tours
www.oxfordofficialwalkingtours.org



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