OxLEP
driving economic growth

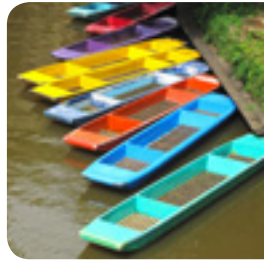# Creating the Environment for Growth

A Strategic Investment Plan for Oxfordshire
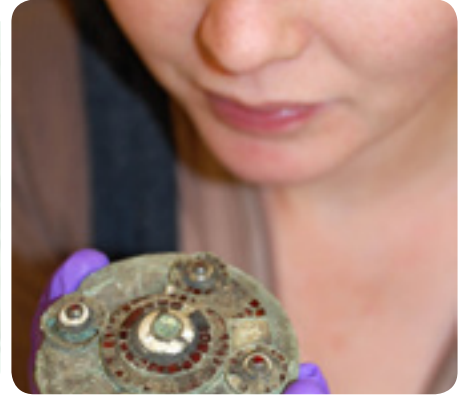
Creativity

Culture

Heritage

Tourism

CONTENTS

Foreword

Oxfordshire is a very attractive place to live, work, visit and do business. Famous for its academic excellence, innovative industries, outstanding heritage and glorious countryside, the county attracts a worldwide audience.

Our economy is thriving, in part delivered by our creativity, cultural, heritage and tourism industries that contribute significantly to our quality of life and pride of place.

This Investment Plan demonstrates the diversity of these sectors and the opportunities that exist to expand and develop new ideas. This has been made possible through the involvement of the Steering Group Board members that also included the close collaboration of both Universities. It aims to build this sector of the economy at home and attract investment from overseas.

Through this process we attracted 35 proposals for the Investment Plan with a total value of £44.5 million. Collectively these proposals present an opportunity to bring our partners together so they can cluster around our priority themes to further develop proposals, call for additional proposals and set out clearly the opportunities for growth.

This is just the start of a process. We will undertake further work to implement the proposals, promote successful projects, and to identify and respond to new challenges and opportunities as they emerge.

We will do this through a CCHT sub-group, to be set up in the summer that will include an OxLEP Board member with responsibility for the sector. The sub-group will report directly to the OxLEP Board.

We have ambitious county-wide plans for the future that will ensure that the best talent and businesses will want to come to Oxfordshire, so they too can contribute to and enjoy the county's future prosperity.

The proposals set out in this plan against the backdrop of ever tighter funding opportunities call for innovative and strategic thinking, but by working collaboratively with partners, and driving forwards together, we have the ambition to get things done.

Nigel Tipple
CEO - Oxfordshire Local Enterprise Partnership
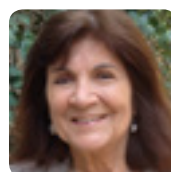
Cllr. Lorraine Lindsay-Gale
Oxfordshire County Council Cabinet Member for Cultural & Community Services

OxLEP
driving economic growth

OXFORDSHIRE COUNTY COUNCIL
www.oxfordshire.gov.uk

Supported using public funding by
ARTS COUNCIL ENGLAND

A message from the Minister

"We live in one of the most beautiful, safe and economically vibrant parts of the UK. As an Oxfordshire MP since 2005, I have witnessed first-hand the vitality of our outstanding creative, cultural, heritage and tourism (CCHT) industries. They are integral to the county's economy, creating growth and supporting jobs for thousands of local people.

In March 2016 I published the first Culture White Paper in more than 50 years, which will help guide and shape investment priorities in culture for Oxfordshire for several years. It is great to see this Investment Plan consider some of its key themes - including how culture can be used in place-making.

We live in unprecedented times. Following the British people's historic decision to leave the EU, CCHT sectors have a unique and crucial role to play in bringing communities together and protecting the health of our economy.

This Investment Plan provides an ambitious blueprint for the future of CCHT in Oxfordshire and I very much look forward to working with the Oxfordshire Local Enterprise Partnership, my parliamentary colleagues and others to ensure its successful implementation."

Ed Vaizey,
Minister of State for Culture & Digital Economy,
MP for Wantage & Didcot

Acknowledgements

The steering group would like to thank everyone who participated in this process over the past few months, generously giving up their time to be interviewed, take part in workshops or submit project proposals to develop the Investment Plan for Oxfordshire.

CCHTIP Steering Group

Nigel Tipple	Chief Executive	OxLEP
Cllr Lorraine Lindsay-Gale	Cabinet Member for Cultural & Community Services	Oxfordshire County Council
John McPherson	Relationship Manager, Visual Arts	Arts Council England
Bob Price	Leader of the Council	Oxford City Council
Hayley Beer-Gamage	Chief Executive	Experience Oxfordshire
Paul Inman	Pro-Vice Chancellor, Dean of Technology, Design & Environment	Oxford Brookes University
Kirsten Shepherd-Barr	Professor of English and Theatre Studies, Knowledge Exchange Champion for the Humanities	University of Oxford
Dawn Pettis	Economic Development Strategy Manager	OxLEP
Vicky Field	Service Manager, Cultural Services	Oxfordshire County Council
Tony Hart	Network Navigator for Digital, Media and Publishing	OxLEP
Nicola Riley	Shared Interim Community, Partnerships and Recreation Manager	Cherwell and South Northamptonshire District Council

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1.0 Summary

Oxfordshire is a county where creativity, culture, heritage and tourism (CCHT) come together

They are vital to who we are and where we want to be, for our identity and sense of place, and to our aspirations and values. This is why they underpin our ambition for economic growth and shape our vision for the type of places we want to live and work and for which we want others to invest and visit.

This Investment Plan sets out a new growth agenda, in line with the ambition outlined in the Strategic Economic Plan (SEP), led by Oxfordshire Local Enterprise Partnership (OxLEP) and its partners, that have People, Place, Enterprise and Connectivity as its four core themes. Oxfordshire is set to experience significant growth up to 2031 and there will be a need to maximise the potential of key sectors as a way of building a diverse knowledge intensive economy.

The creative industries and tourism have an opportunity to play an important role here in generating jobs and contributing to innovation and competitiveness across the economy. But this will only happen if better use is made of the cultural and heritage assets, for the jobs they generate but also for the added value they create by enhancing the quality of places, improving their appeal, and helping to ensure growth is sustainable, inclusive and sensitive to our distinctive sense of place.

The economic and wider social argument for investing in the CCHT sectors is compelling:

- In the UK, over **1.8 million people work in the creative industries**[1]. They contribute almost **£84bn in gross value added (GVA)**, equivalent to 5.2% of the economy (and over 10% in our cities) and they are **growing at close to 9%**[2], higher than any other sector. In 2011, the Government outlined their ambition for the UK to become a world leader in the creative industries[3], with employment forecast to **grow by 32% by 2020**[4].

- **The tourism sector**[5] **is a major provider of employment and growth contributing £126.9 billion to the national economy** and employs 3.1 million people, which is 9.5% of total employment[6]. It supports **over 32,000 jobs**[7] in Oxfordshire alone.

- The cultural and heritage sectors are also major contributors of economic value, plus of course vital to the quality and purpose of our lives and fundamental to our identity and sense if place. For example, **our publicly invested cultural sector returns 0.4% of the UK's GVA** and contributes indirectly to GVA through

1.   Department of Culture Media and Sport (June 2015) Creative Industries 2015: Focus on Employment.
2.   Department of Culture Media and Sport (January 2016) Creative Industries Economic Estimates.
3.   BIS, (2011), The Plan for Growth.
4.   Creative & Cultural Skills, (2010), Sector Skills Assessment for the Creative and Cultural Industries.
5.   Throughout this report 'tourism' sector/industries/economy refers to both tourism and visitor economy. It includes international tourists and domestic visitors for leisure and or business unless otherwise stated.
6.   Deloitte (2013) Tourism: jobs and Growth. The economic contribution of tourism to the UK economy, VisitBritiain.
7.   Tourism South East, The Economic Impact of Tourism on Oxfordshire Estimates for 2014.

tourism, overseas trade and regional growth. Culture (inclusive of the arts) is worth **£7.7 billion GVA to our economy** and the sector **generated £15.1 billion** in turnover in 2012-13, an increase of 26% since 2010. **For every pound generated by culture, an additional £1.06 is generated in the economy**[8].

This Investment Plan will help transform Oxfordshire and provide a framework for closer cross-sector working.

Blenheim Gardens – Blenheim Palace

The CCHT sectors have an exceptional opportunity to attract enhanced investment to Oxfordshire due to its unique offer and growth potential. This can be achieved through its innovative creative and digital businesses; inspirational museums and cultural infrastructure of the Universities; outstanding heritage organisations and destinations across the county; and through its beautiful rural landscape.

The Virtuous Circle of growth, quality and sustainability

There is a "virtuous circle" at play here, where each of these sectors contributes to and benefits from the other while delivering growth, innovation and competitiveness to the rest of the economy. For example, a strong and high quality tourism sector depends on creative and digital innovation if it is to be more accessible, interactive and competitive. A rich and engaging heritage sector is all the more compelling if

8.   All sourced from: Contribution of the arts and culture industry to the national economy, CEBR for Arts Council England, July 2015.

it is animated by contemporary creative and cultural activities and if it generates new tourism experiences. This is presented below in **Figure 1** as the unique value proposition we have developed for this Investment Plan:

Figure 1 – The Virtuous Circle for this CCHTIP

Culture
Our places, identities, traditions.
Our arts, events, expressions and performances.
Our businesses, organisations and their activities.

Creative Industries
Our places, identities, traditions.
Our creative jobs across the economy.
Our specialisms in creative industries.
Our hubs, clusters and networks.
Our innovation and R&D.

Heritage
Our places, identities, traditions.
Our tangible assets – built & natural environment.
Our intangible assets – collective memory, stories, expressions.

Tourism
Our places, identities, traditions.
Our offer to visitors – infrastructure and layered experiences.
Our businesses and jobs delivering these experiences.

Connected Collaborative Convergent

Jobs Innovation Growth

1.1 Oxfordshire's Cultural, Creative, Heritage and Tourism (CCHT) Prospectus

Oxfordshire's CCHT sectors provide a prospectus of opportunity and already play a major role in the economic life of the county. The role of culture and heritage give an important sense of place and identity but also contribute to the quality of life and health and wellbeing of its inhabitants.

Four thematic areas were developed for this Investment Plan that will help deliver the growth goals of the OxLEP Strategic Economic Plan 2016.

- **Productive and Engaging Experiences** - a dynamic creative industries sector energising the county; or an interactive cultural sector helping to re-invigorate our heritage assets and stimulate new types of tourism.

- **Skills, talent development and business growth** - building more competitive and innovative CCHT businesses; improving knowledge and technology transfer, and ensuring the sector is open to talent from different backgrounds.

- **Creative Place-making** - the ways we position the CCHT sectors as drivers for or value-adders to growth and development agendas; the role of local cultural participation and a distinctive heritage offer in giving our places their unique identity and in shaping opportunities for tourism and investment; and the balance of urban and rural influences on the cultural geography of the county.

- We also explored a cross-cutting theme – **collaboration** to scope how we can work more effectively to deliver higher growth with a more sustainable approach, at a time of reduced funding.

Bicester Village – Value Retail PLC

The Oxford(shire) brand and identity is internationally recognised and renowned

The county is steeped in history and prestige from the "dreaming spires" of Oxford to the formidable excellence of the universities and their contribution to cultural life and the creative and knowledge economy.

Oxfordshire welcomes nearly 27 million visitors a year, which places Oxfordshire in the top 10 for inbound visitors to the UK, worth £1.86 billion per annum in 2014. **Experience Oxfordshire** is the Destination Management Organisation for the county, with a brief to grow the Visitor Economy. This has included the astonishing success of Bicester Village which attracts over 6 million visitors a year, and is now one of the UK's foremost retail destinations outside London and acts as a major draw for international visitors. The contemporary year round cultural offer, festivals and events, are also diversifying the tourism portfolio for Oxfordshire, complementing the more established 'brands' such as the Cotswolds, River Thames, and cultural and heritage destinations.

Oxfordshire has a stunning cultural landscape of breadth depth, quality and distinctiveness:

- **In the outstanding cultural institutions, organisations and venues** - which include large and nationally significant galleries and museums including the Ashmolean Museum of Art and Archaeology, Oxford University Museum of Natural History, the Pitt Rivers Museum and Bodleian Libraries, the Story Museum, Modern Art Oxford and the Oxfordshire Museum and Museum Resource Centre. In addition the Oxfordshire Music Service makes a difference to the lives of many young people

and Oxfordshires six local authorities offer extensive opportunities for people to participate in cultural activities and develop skills. Oxfordshire Artweeks connects artists to audiences across the county; and some extraordinary theatres, libraries and arts and cultural centres and organisations including the Pegasus Theatre in Oxford, Cornerstone in Didcot, the Old Fire Station and OVADA[9] in Oxford, and The Mill Arts Centre in Banbury reach out to many disadvantaged groups.

Cornbury Festival - ©Conrnbury Festival

- **In a very rich heritage offer** - of stately homes including major international destinations such as the UNESCO World Heritage Site of Blenheim Palace, historic colleges, medieval streets, ancient monuments, market towns, villages, and a landscape which has been farmed continuously for centuries.

- **In the range and quality of festivals and events** - including world class events like the Oxford Literary Festival and many music festivals such as Cornbury, the unique Cowley Road Carnival not to mention the many rural arts crafts and food events.

The Oxfordshire creative industries sector offers high growth and high value

The county has particular strengths in publishing, software, games and design/crafts, plus a vibrant ecosystem of artists, micro creative companies and networks hubs and events. The 'elevator pitch' of Digital Oxford neatly summarises the asset base and opportunity for the digital media elements of the creative industries:

"21,000 digital minds; 2 world-class universities; an international gaming hub; 30 monthly meet-ups; 9 major business parks; 3 massive tech conferences; a digital industry worth £500m[10]"

The cultural and heritage sector plays an important role as an enabler, connector and commissioner for the creative industries, with an expanding role for organisations looking to reach audiences in new ways and to diversify their revenue streams. Innovation is part of this sector's DNA. Creative businesses are almost exclusively SMEs or micro-businesses with 94% employing fewer than 10 staff. As a result work is often collaborative and embraces new technologies. Consequently:

- In an average year, the number of creative businesses introducing a new product is around 20%, compared with only 9% for non-creative sector firms[11].

9.   OVADA is a contemporary Art Gallery and visual art development space in Oxford providing unique opportunities for both artists and audiences www.ovada.org.uk
10.   Digital Oxford (2015) www.digitaloxford.com
11.   Bakhshi H., Hargreaves I. and Garcia J.M., (2013), A Manifesto for the Creative Economy, London: NESTA.

- The GVA contribution made by a creative professional is almost double the average GVA contribution of an employee across the wider economy[12].
- Firms that spend double the average on creative industries inputs are 25% more likely to introduce products or services that are new to the firm or market[13].

The excellence and innovation of the Oxfordshire education sector

The city of Oxford flourishes as a global hub for research, teaching and learning. It has within it the ingredients to be a globally significant centre for knowledge intensive industries with technology, culture and creativity key enablers. As Steve Jobs put it:

"It's in Apple's DNA that technology alone is not enough - it's technology married with liberal arts, married with the humanities, that yields us the result that makes our heart sing, and nowhere is that more true than in these post-PC devices"[14].

The University of Oxford's Ruskin School of Art and Oxford Brookes University School of Arts with its leading Oxfordshire International Centre for Publishing have a reputation for innovation and excellence and can compete successfully on the world stage. The county's schools all play a vital role in talent development, inspiring and equipping young people to flourish in creative and knowledge intensive jobs and are working hard to narrow the gap in attainment and education. Many organisations within the county now work collaboratively with support from the Oxfordshire Skills Board to open up opportunity to everyone.

> Businesses in the creative industries are almost exclusively SMEs and Micro-businesses.
> 94% have fewer than 10 employees.

Story Museum September 2015 – A Walmsley

12. University of Birmingham, (2011), Creative Industries in the South East LEP.
13. Chapain et al., (2010), Creative clusters and innovation: Putting creativity on the map,
14. Steve Jobs (2011) iPad launch event San Francisco.

1.2 Why this matters now

Oxfordshire expects to see significant development over the next few years and OxLEP's role through its partners will help identify and prioritise sectors that can deliver that growth. However to remain competitive and attract investment it will be essential to coordinate the offer more effectively and work together to build on its many strengths.

Many countries recognise the benefits of a strong creative and cultural sector but at a time of increasing cuts to government funding this will result in organisations having to make difficult decisions. However with the right leadership and drive towards sustainability the sectors have the opportunity to develop through innovation and diversification and can also benefit from new ways of using technology to reinvigorate the heritage and cultural sectors.

This Investment Plan sets out a new model for a higher growth and more self-sustaining economy for Oxfordshire. The wide consultation process involved many of the key innovators and resulted in 35 investment proposals being submitted costed at £44.5 million that will inform future priorities. Experience Oxfordshire[15] has been appointed as Network Navigator to broker collaborative working and will sit on the OxLEP sub-group that will promote and deliver the Investment Plan. Overall, this Investment Plan represents the beginning of a new journey for partnership working in Oxfordshire, where CCHT sectors are positioned as must-have ingredients for high value growth in high quality places.

Witney – Oxfordshire Cotswolds, Experience Oxfordshire

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15.   Experience Oxfordshire is currently the Destination Management Organisation for Oxfordshire. Its role could be extended, with the right resources, to play more of a co-ordinating role for the CCHT sectors as outlined throughout this CCHTIP.

Milton Park – OxLEP

2.0 The Investment Opportunity

Oxfordshire is one of only three areas in the country that make a positive contribution to the exchequer.

Oxfordshire is a world-leading location for research, education and high technology business, with particular strengths in Life Sciences, Automotive Motorsports, Space Technologies, Creative & Digital and Electronics & Sensors. The rural economy is also strong, including a diverse agricultural sector and growing renewable energy sector as well as an increasing number of small businesses. These strengths, combined with a wealth of creative, cultural, heritage and environmental assets in both urban and rural settings, make Oxfordshire a highly attractive place to live and work and attract increasing numbers of visitors.

The county is home to around 661,000 people and supports around 381,000 jobs. In addition, the county contributes £15.5 billion annually to national output and is one of only three areas in the country that provide positive contributions to the Exchequer. This is mainly through academic excellence including the two universities, the appeal of Oxford's global brand to business and tourism, and high quality economic assets.

Significant activity is underway to drive further economic growth in Oxfordshire, attracting local, national and international investment. This activity is being spearheaded by OxLEP and the public and private sector organisations which comprise its membership. In addition to capitalising on the clear potential for growth in 'Big Science', the Strategic Economic Plan (SEP) emphasises the importance of cultivating the green economy and encouraging tourism. The county's academic excellence and entrepreneurial spirit are reflected in the priorities for the SEP, which are grouped into the themes of innovative:-

People: Deliver and attract specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive employment and fulfilling jobs.

Place: Provide the quality environment and choice of homes needed to support growth and capitalise upon the exceptional quality of life, vibrant economy and the dynamic urban and rural communities of our county.

Enterprise: Encourage innovation led growth, underpinned by Oxfordshire's strengths in University research and development, business collaboration and supply chain potential.

Connectivity: Allow people to move freely, connect easily and provide the services, environment and facilities needed by a dynamic, growing and dispersed economy.

Oxford, Bicester and Science Vale to the south of the county are major growth points for research and high tech development. Job creation targets of 85,600 new jobs by 2031, will further stimulate a housing market that is already subject to high demand and pressure on affordability. Around 100,000 new homes are needed by 2031 in order to meet this demand, according to the Oxfordshire Growth Board Strategic

Housing Market Assessment 2014. These will need to be developed in locations which provide good access, particularly by public transport, to employment sites in Oxford, and to town centres. **Figure 2 shows a map of the main areas for growth throughout Oxfordshire**.

Significant development is planned at Bicester and Didcot, which have both been given **'Garden town'** status by the Government. In Bicester, this opens the way for 13,000 new homes, and in Didcot 15,000 new homes. There are also jobs targets – with 20,000 new jobs projected for Didcot; and infrastructure opportunities – with up to £100 million available for each town to manage this growth. Banbury, Wantage, Grove and Witney will also see major housing growth with associated jobs and infrastructure targets. Oxford is also set to see major development, although capacity for growth within its administrative boundaries is limited[16]. Other growth opportunities include a new Business Improvement District for Abingdon[17], which is geared toward enhancing and diversifying the economy of this historic town.
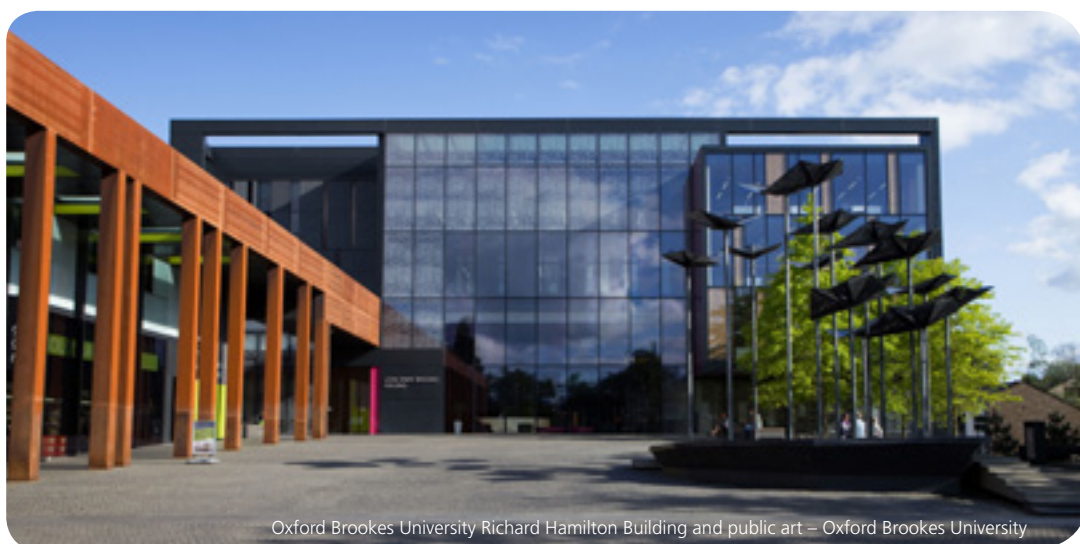
Oxford Brookes University Richard Hamilton Building and public art – Oxford Brookes University

OxLEP has already secured significant contributions for infrastructure and other measures to support business and growth, including the City Deal (£55.5 million announced in January 2014), Oxfordshire Growth Deal (£118.46 million announced July 2014 and January 2015), and European Structural Investment Fund (£13.4 million) and EAFRD (£2.5 million) funding (Values between the € and £ will fluctuate according to the exchange rate, so may vary).

Together this new investment in housing, infrastructure and business activity will introduce major opportunities for CCHT investment:

• As a direct priority area where the CCHT sectors can provide new jobs and enhance the quality of infrastructure.

Bicester and Didcot have been given "Garden Town" status.

16. Through the Oxfordshire Growth Board, the Oxfordshire authorities are undertaking joint work to identify how Oxford's unmet needs can be accommodated, taking account of the capacity of transport networks and other strategic infrastructure, and the environmental and cultural impacts of development.
17. Where businesses will co-invest in town centre improvements. In total it is estimated this will create almost £800,000 over the course of five years, all of which will be invested directly back into the town centre. This can include cultural activities such as festivals, public realm improvements, and the revitalisation of empty units for creative use. See: www.whitehorsedc.gov.uk

- As a provider of value-added, with the spillover effects of investment in CCHT sectors enhancing the desirability of places for inward investment, giving places distinctiveness and confidence, and connecting existing communities to incoming ones.

Through the Local Growth Fund alone, OxLEP estimate that up to 9000 new jobs could be created, 5000 new homes built with the potential to generate £440 million public and private investment between 2015 and 2021. The Growth Deal is part of a long-term plan to devolve at least £12 billion from central government to local economies.

Figure 2 Oxfordshire - Aerial view of the main areas for growth:

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3.0 Creative, Cultural, Heritage and Tourism – Driving Growth and Competitiveness

1.8 million people work in the creative industries in the UK and contribute £84B in GVA.

The creative, cultural, heritage and tourism sectors make up a significant part of the UK economy and are increasingly recognised for their role in driving growth and competitiveness and generating spillover effects to other sectors. Over 1.8 million people work in the creative industries[18]. They contribute almost £84 billion in gross value added (GVA), equivalent to 5.2% of the economy (and over 10% in our cities) and they are growing at close to 9%[19], higher than any other sector. Culture (inclusive of the arts) is worth £7.7 billion GVA to our economy and the sector generated £15.1 billion in turnover in 2012-13, an increase of 26% since 2010. For every pound generated by culture, an additional £1.06 is generated in the economy[20].

In addition, knowledge is growing of their wider contribution to the health, wellbeing and cohesion of our society – offering a range of outcomes that should not be underestimated for their significance in shaping civil society as an advanced nation that combines prosperity with fairness and growth with inclusion.

Enriching Britain – Culture, Creativity and Growth[21] asserts:

The creative, culture, heritage and tourism sectors play an important role in the health and wellbeing of its citizens and contributes to social cohesion.

"The Cultural and Creative Industries are now recognised as one of the mainsprings of the British economy and their future sustainability and growth need to become a priority for the nation. We must begin to care about, understand and invest in our cultural and creative assets in the same way that we value and plan for health, education and welfare. Too often we have let our historical advantage in key industries be eroded by our international competitors. To sustain our success, we need to invest in and support our world-class Cultural and Creative Industries and the cultural and creative traditions that feed them and make them special".

Cotswold Wildlife Park – Susan Muir

18.   Department of Culture Media and Sport (June 2015) Creative Industries 2015: Focus on employment.
19.   Department of Culture Media and Sport (January 2016) Creative Industries Economic Estimates
20.   All sourced from: Contribution of the arts and culture industry to the national economy, CEBR for Arts Council England, July 2015.
21.   The Warwick Commission, (2015), Enriching Britain: Culture, Creativity and Growth. The 2015 Report by the Warwick Commission on the Future of Cultural Value, Coventry: The University of Warwick, p.12.

Oxfordshire is part of the UK creative and cultural success story.

Oxford is a prime knowledge and creative hub; and with its rich and diverse heritage and contemporary cultural offer, the city and county play a vital role in the cultural identity and geography of the nation, attracting high levels of tourism and investment as a consequence. The creative industries are at the heart of the tourism and visitor economy, particularly in places like Oxfordshire built on the heritage and cultural assets and increasingly the contemporary cultural offer. Tourism contributes £126.9 billion to the UK economy and employs 3.1 million people, 9.5% of total employment[22]. 32,000 people are employed in tourism in Oxfordshire, 10% of total employment[23]. Like the cultural and creative industries, the tourism economy is also growing at a faster rate than other industrial sectors proving additional employment at almost twice the rate of other sectors.

The tourism and visitor economy contribute £126.9B to the UK economy. 32,000 people are employed in Oxfordshire - 10% of the population.

Belmond le Manoir aux Quatre Saisons – Experience Oxfordshire

However, as *Enriching Britain* makes clear, we cannot collectively or individually take any perceived advantage for granted and we must be both imaginative and deeply committed if cultural and creative industries are to play their full role for our wider economic growth and wellbeing. It is vital for partners in Oxfordshire to make more of existing assets, work more collaboratively, and seek ways to leverage national investment through sharp alignment of local and national priorities. For example, the DCMS, Culture White Paper[24] published in March 2016 will help to shape investment priorities in culture for Oxfordshire for several years. Similarly, the *Five Point Plan: Backing the Tourism Sector* launched by Government in July 2015, outlines their commitment to boosting tourism beyond London. The Plan, which is associated with additional funding to support tourism development (through the Discover England fund and an increase in GREAT fund)[25], will support the five ambitions for:

The DCMS Culture White Paper was published in March 2016 and will help shape the future of Oxfordshire.

22. Deloitte (2013) Tourism: jobs and Growth. The economic contribution of tourism to the UK economy, VisitBritiain.
23. Tourism South East Research Unit The Economic Impact of Tourism on Oxfordshire Estimates for 2014.
24. DCMS, The Culture White Paper, March 2016 https://www.gov.uk/government/publications/culture-white-paper
25. Visit Britain (2015) Government's five-point tourism plan. www.visitbritain.org/governments-five-point-tourism-plan.

The Five Point Plan: Backing the tourism sector was launched in July 2015 and will boost tourism beyond London.

- A better coordinated sector: local attractions and tourism organisations collaborating to grow the sector.

- Skills and jobs: Driving and retaining talent in the sector to encourage growth.

- Common sense regulation: Reforming regulation sensibly to drive competition and improve the tourism offer for visitors.

- Transport: Forging innovative links between the transport and tourism sectors to help visitors travel outside of the capital.

- An improved welcome: Delivering a world class welcome.

These are each opportunity areas for Oxfordshire as partners seek to more effectively leverage value from the existing CCHT offer and generate new value through more effective partnership working and smart investment.

Swan Inn Swinbrook – Swan Inn Experience Oxfordshire

Henley Royal Regatta - © Henley Festival

Figure 3 opposite provides an aerial view of the current economic profile of the UK's CCHT[26] economy. **Figure 4** provides a similar aerial view for the contribution of CCHT to the economy for Oxfordshire. However, full economic data is not available on these different sectors at a local level. With the wealth of research and business expertise in the county, an initiative to measure and track the contribution of these vital sectors to the economic and social wellbeing of the county would be valuable. It would position Oxfordshire at the forefront of cultural and creative impact and value analysis debate that are ongoing at a national and international level.

26.   As set out in the 2015 Comprehensive Spending Review.

Figure 3: Contribution of the Creative, Cultural, Heritage and Tourism Sector to the National Economy. (The statistics summarised here are included throughout the report with references. All references are included in Appendix 1).

The National Picture

UK Creative Economy

Big employer
- 2.8 million employed
- 8.8% of all jobs
- 10.2% of all jobs in South East

Significant growth
- Jobs growth 4 times greater than economy as whole over last 15 years

43% of Creative Economy jobs are in London and SE but other regions growing faster:
- London 2.9%, South East 4.5%, West Midlands 8.2%, East of England 9.3%.

Tourism

The UK is the eighth largest international tourism destination by visitor numbers and expenditure.
- UK tourism industry employs 3.1m people, 9.6% of total employment
- Contributes £126.9bn to the national economy
- 70% of tourism businesses employ less than 10 people
- 29.8 million trips a year by overseas visitors, British residents make 92.6 million overnight trips in England. There are 1.3 billion day trips to English destinations.

UK Creative Industries

Big employer
- 1.8 million employed
- 5.6% of all jobs

Driving UK economy growth
- Jobs growth 5.5 times greater than economy as whole over last 15 years
- GVA of Creative Industries £84bn -increased 37.5% over last 5 years compared to 18.2% in whole economy
- Creative Industries exports grew by almost double the rate of the whole economy 29.7% v. 15.4%.

Micro Business sector
- 85% employ less than 10 people
- 43% self employed

Arts and cultural industries
- 128,000 employed.
- GVA £7.7 bn – increased 35.8% over last 3 years.
- Jobs more productive, particularly publishing, sound recording and music publishing where job GVA 2 times average jobs GVA

Museums
- 38,165 people employed
- GVA £1.5 bn

Heritage
- 253,000 jobs in built and natural heritage operations
- 209,390 jobs in heritage crafts

Heritage and cultural tourism
- 48% of international visitors to England visit a castle or historic house
- 43% visit a museum or gallery
- 14% visit theatre, opera and ballet
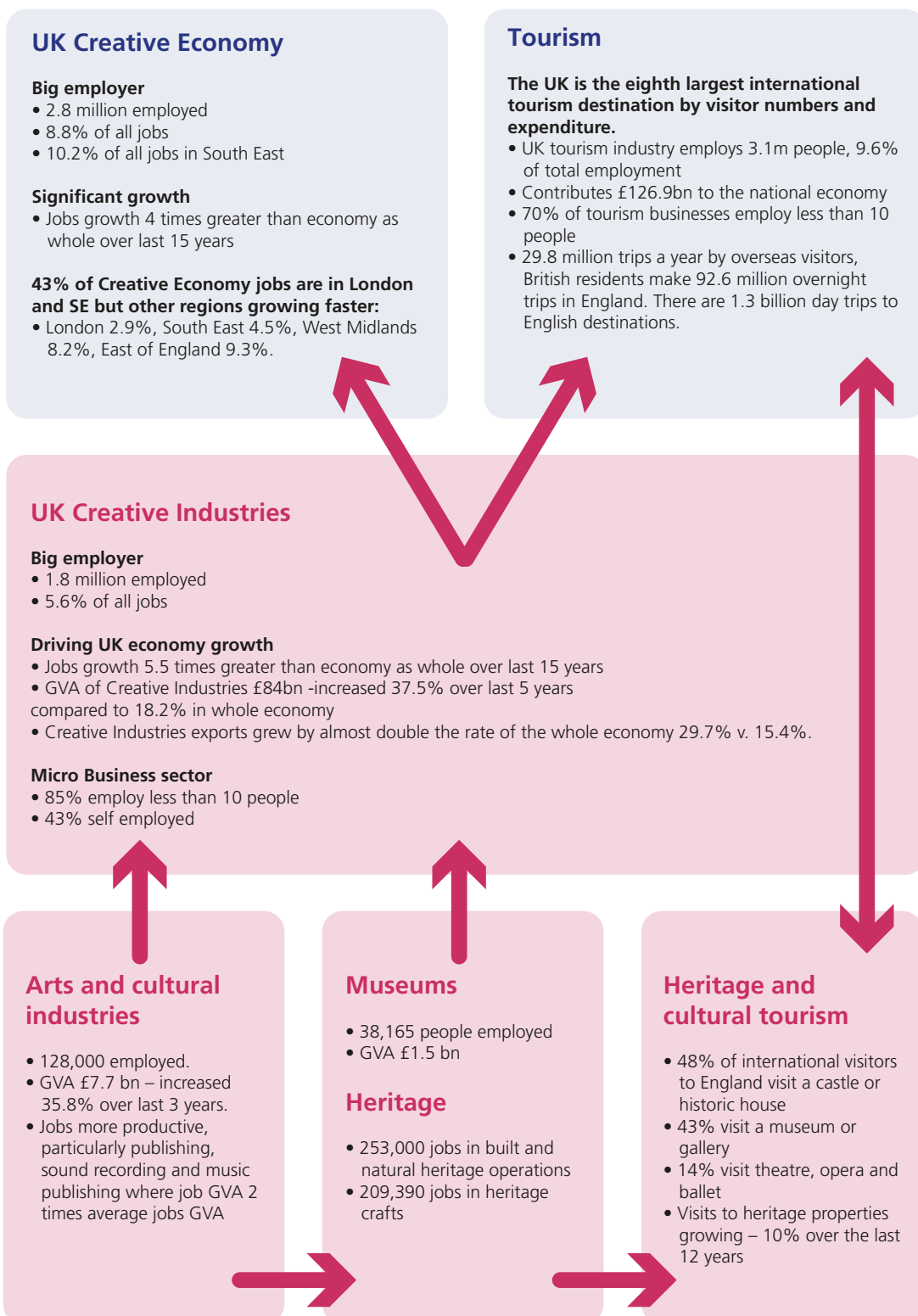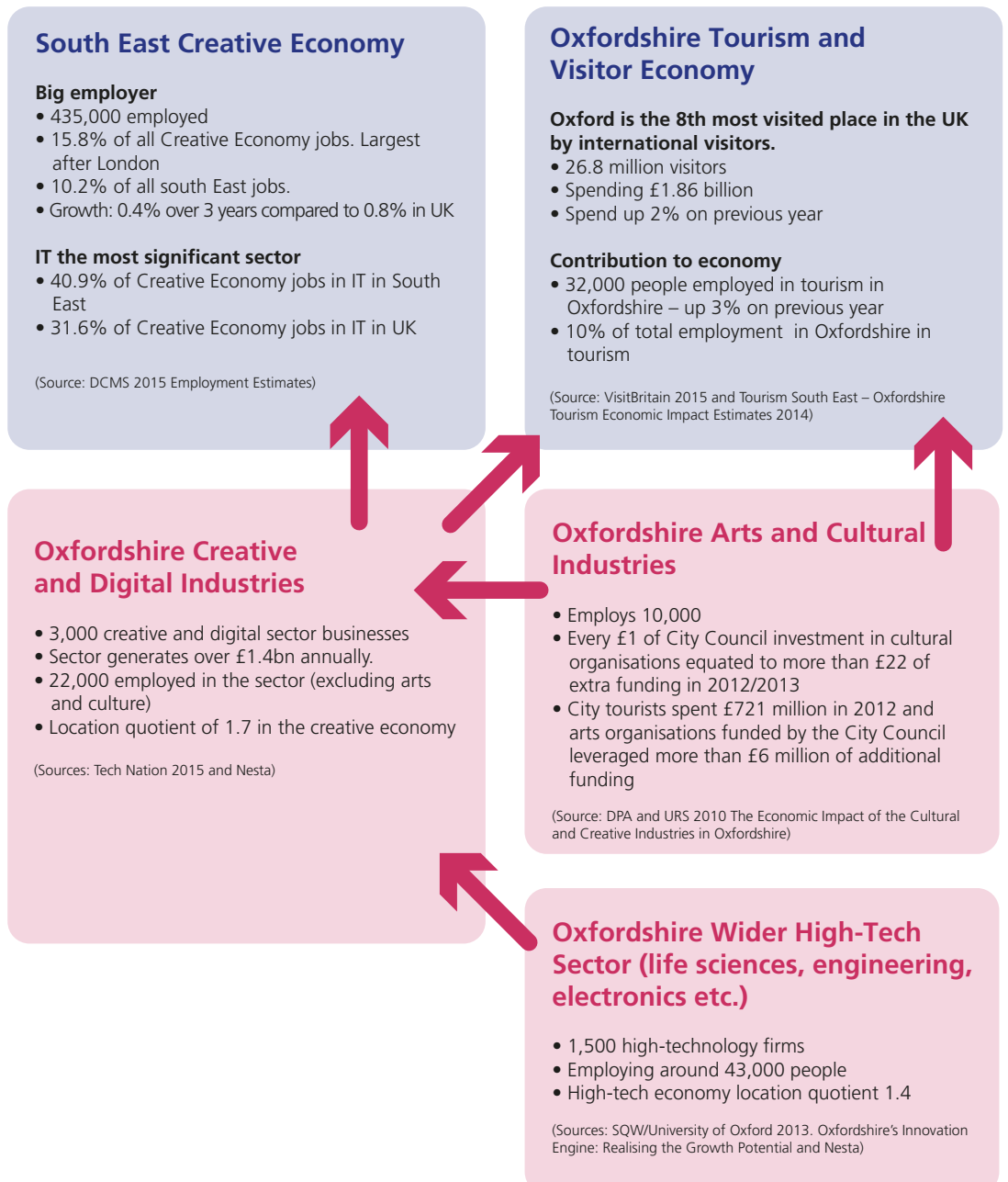- Visits to heritage properties growing – 10% over the last 12 years

Figure 4: Contribution of the Creative, Cultural, Heritage and Tourism Sector to the Oxfordshire Economy.

The Oxfordshire Picture

South East Creative Economy

Big employer
- 435,000 employed
- 15.8% of all Creative Economy jobs. Largest after London
- 10.2% of all south East jobs.
- Growth: 0.4% over 3 years compared to 0.8% in UK

IT the most significant sector
- 40.9% of Creative Economy jobs in IT in South East
- 31.6% of Creative Economy jobs in IT in UK

(Source: DCMS 2015 Employment Estimates)

Oxfordshire Tourism and Visitor Economy

Oxford is the 8th most visited place in the UK by international visitors.
- 26.8 million visitors
- Spending £1.86 billion
- Spend up 2% on previous year

Contribution to economy
- 32,000 people employed in tourism in Oxfordshire – up 3% on previous year
- 10% of total employment in Oxfordshire in tourism

(Source: VisitBritain 2015 and Tourism South East – Oxfordshire Tourism Economic Impact Estimates 2014)

Oxfordshire Creative and Digital Industries

- 3,000 creative and digital sector businesses
- Sector generates over £1.4bn annually.
- 22,000 employed in the sector (excluding arts and culture)
- Location quotient of 1.7 in the creative economy

(Sources: Tech Nation 2015 and Nesta)

Oxfordshire Arts and Cultural Industries

- Employs 10,000
- Every £1 of City Council investment in cultural organisations equated to more than £22 of extra funding in 2012/2013
- City tourists spent £721 million in 2012 and arts organisations funded by the City Council leveraged more than £6 million of additional funding

(Source: DPA and URS 2010 The Economic Impact of the Cultural and Creative Industries in Oxfordshire)

Oxfordshire Wider High-Tech Sector (life sciences, engineering, electronics etc.)

- 1,500 high-technology firms
- Employing around 43,000 people
- High-tech economy location quotient 1.4

(Sources: SQW/University of Oxford 2013. Oxfordshire's Innovation Engine: Realising the Growth Potential and Nesta)

Studio One Control Room – Neve Genseys SAE

4.0 A Knowledge-intensive Creative and Digital Economy

The University of Oxford is ranked 2nd in the world for teaching, research and international outlook.
Oxford Brookes University is one of the best modern universities in the UK with one of the highest levels of graduate employment.

Oxfordshire has a strong economy and a global reputation as an education and innovation leader. The University of Oxford is ranked 2nd in the world for teaching, research and international outlook[27] and Oxford Brookes is rated as one of the best modern universities in the UK, with one of the highest levels of graduate employment[28]. Both universities are in the top ten for investment in arts and culture. This strong knowledge economy provides much of the talent into the CCHT sectors, and it drives much of the innovation on which they depend.

Alice Anderson, Time Capsules, Glass Tank 2016 - Oxford Brookes University

The Tech Nation Report on the Digital Economy ranks Oxfordshire as one of the UK's top 8 high tech clusters.

Oxfordshire is amongst the top five Technology Innovation Ecosystems in the world[29], through a combination of academic excellence, research ideas, networks and skills centered around key high-tech industries: Life sciences; physics related specialisms including cryogenics; engineering and electronics including motorsports, telecoms and computer hardware and software. The county is home to a knowledge sector with 1,500 high-technology firms employing around 43,000 people[30]. Tech Nation, a recent study of the UK's digital economy, found Oxfordshire to be 8th in terms of employment, among 27 high-tech clusters driving the UK digital economy. Oxfordshire is identified with growing strengths in education and health tech sectors. Big data and cyber security, App & software development, enterprise software & cloud computing are identified as additional sector strengths[31].

27. Times Higher Education, (2015), Times Higher Education World University Rankings 2015-16, online.
28. Times Higher Education, (2015), The Times University League tables, online..
29. Oxfordshire LEP (2014) Strategic Economic Plan.
30. SQW, (2013), Oxfordshire's Innovation Engine: Realising the Growth Potential, SQW Client:University of Oxford and Science Oxford, online.
31. Tech City/Nesta, Tech Nation 2016

Access to talent and digital and tech networks are two of the main strengths for digital businesses in Oxfordshire[32]. The county has a highly skilled population: Over 46% of the resident Working Age Population is qualified to NVQ level 4 (degree level) and above. This is over 11% higher than the UK as a whole (35%) and more than 7% higher than across the South East (38%)[33]. Further Education institutions, such as Abingdon and Witney College (with its creative industries and arts specialisms), play a crucial role here, working with schools and industry to reduce inequality and bridge skills gaps in the creative and digital sectors to ensure the sectors are more accessible and thus inclusive of the diverse talent base which exists across the county.

> **46% of the resident Working Age Population is qualified to degree level or above.**

The creative and digital sector is both an enabler and a business sector in its own right. As an enabler it brings the technologies and skills that businesses need to manage themselves, secure their assets, communicate to their suppliers and customers, and market their products and services. As a business sector it includes parts of many creative industries: publishing, film, gaming and animation, as well as computer sub sectors: cybersecurity, big data analytics and quantum computing. Trip Advisor is one of the largest organisations outside London with a popular on-line booking system used by tourists, attracted to Oxfordshire by its highly skilled workforce. The recently published Oxfordshire Sector Profile: Creative and Digital, highlights the particular strengths in these sectors within and for the county[34], and their close links to other high-tech knowledge industries.

Students Filming – OxLEP

Oxfordshire's creative and digital industries make a substantial contribution to the county's economy. There are over 3,000 creative and digital sector businesses in Oxfordshire, generating over £1.4bn annually[35].The sector employs around 22,000 - on a par with the tourism sector and employment within the universities[36].This figure does not include employment in the wider arts, cultural and heritage sectors, which are estimated to employ over 10,000 people[37]. Nesta identifies the county as having a location quotient of 1.7 in the creative economy and 1.4 in the high-tech economy[38], demonstrating Oxfordshire's strengths in these sectors compared to other parts of the country. The city and county also have significant strengths in gaming, television, film, music and sound[38].

> **Oxfordshire has a strong knowledge economy with 1,500 high tech firms employing 43,000 people.**

32. Tech City (2016) Tech Nation Report
33. Mickeldore (2015) Oxfordshire Sector Profiles Creative & Digital
34. Invest in Oxfordshire (2016) Oxfordshire Sector Profile: Creative and Digital.
35. Mickeldore (2015) Oxfordshire Sector Profiles Creative & Digital
36. Tech City, 2015, Tech Nation
37. DPA and URS 2010 The Economic Impact of the Cultural and Creative Industries in Oxfordshire
38. Tech City 2015, Tech Nation. The Geographies of the UK Creative and High-tech Economies 2015

Oxfordshire has over 3,000 creative and digital businesses generating £1.4B annually.

These industries also play a crucial role in improving the image, quality of life and distinctiveness of the place or places that are Oxfordshire. They are increasingly collaborators with the wider cultural and heritage sectors, which are undergoing a rapid process of innovation-led development. At a national level, the **Digital R&D Fund for the Arts** (a collaboration between Arts Council England, Nesta and the Arts and Humanities Research Council (AHRC)[39] sought to explore and demonstrate the ways cultural organisations can drive innovation by embracing digital technology - generating outcomes such as greater engagement with audiences, improved management and entrepreneurial skills, and new business models capable of generating revenue from cultural content and services. At a local level, the cultural sector has been incredibly innovative and entrepreneurial, opening up to collaborate with the science and technology sectors, and developing new ways of generating and distributing content. One example of this is the Story Museum's 1001 audio stories; another the way the Museum is converging literature with animation to explore innovation in storytelling.

Ashmolean Museum, Bacon Moore Exhibition – Experience Oxfordshire

Powered by the talent and research generated by the universities, the county has some knowledge and creative networks and innovation hubs of global excellence - such as the newly established Quantum Innovation Hub, one of four across the UK exploring the properties of Quantum Mechanics. There are technical and technology-specific networks, such as Oxford Geeks and UX Oxford, through to sector-specific ones, such OPuS (Oxfordshire Publishing Society) and Film Oxford. The concentration of talent and knowledge hubs has proved an attractive environment for Foreign Direct Investment, with global companies including: Sharp, Toshiba, Siemens, and BMW all locating projects and offices in the county. A second Enterprise Zone in the Vale of White Horse near Didcot, announced in the Spending Review and Chancellors autumn statement in 2015, will serve to make the county even more attractive.

39.   A £7M Fund which completed in September 2015 http://artsdigitalmd.org.uk/

There are a number of key knowledge, innovation and technology hubs across the county that generate a coordinated supply of business-to-business, R&D, talent and market development activities. However it is recognised that the county needs more creative and cultural hubs.

The start-up community in Oxfordshire is also driven by a number of networks, such as Oxford Startups, Oxfordshire Entrepreneurs Forum, Oxford Entrepreneurs and Brookes Entrepreneurs. Regular appathons/hackathons, bring digital innovators together to create solutions and new applications of technology in a range of environments and sectors from Space to Environmental and Low Carbon sectors.

Digital Oxford was launched in early 2015 to connect these multiple hubs and networks and to raise the profile of Oxfordshire as a leading national and international Tech Hub. OxLEP has supported Digital Oxford in the form of Tony Hart 'a digital network navigator'. Tony has led on supporting connections and launching the Digital Oxford online platform which hosts a digital jobs search and finder service. But as Dave Fletcher, Director of White October and Founding Member of Digital Oxford explains:

"We don't intend to be just a platform, we are actually trying to pull it all together and give the industry a voice, and stimulate and promote the digital industry regionally, nationally internationally. Oxford has an enormous creative and digital scene. It just needs to show its confidence. The aim is also for a physical digital space to bring people together to collaborate."

Digital Oxford is now connecting the growing network of digital talent from across Oxfordshire, through its online platform and programme of events. Another aim is to retain graduates in Oxfordshire from the two Universities and attract the best from around the world. Their ambitions are high and there is huge opportunity, but there is still more to do to raise the profile of the digital sector and maximise its potential to deliver innovation across all leading industrial sectors.

Re Assemble, Glass Tank Oxford Brookes University, November 2015 – Oxford Brookes University

4.1 Creative Sub-sectors

A range of individual yet interconnected sub sectors contribute to the overall strength of the creative industries (and associated digital sector) in Oxfordshire. **See Appendix 3** for a detailed description of key organisations and businesses across Oxfordshire's overall 'creative portfolio'. Oxford has several highly regarded training schools for artists. These include the University Ruskin School of Art, Oxford Brookes University School of Art, Oxford Drama School, Ruskin College Writing for Performance, Rycote furniture making and many others.

- **Publishing:** Oxford has the UK's largest centre of publishing outside London. It is estimated to have over 100 publishing businesses, providing over 3,500 jobs. Publishing companies range from large long established businesses, notably **Oxford University Press** (OUP), a department of the University of Oxford, the largest university press in the world and the second-oldest (founded in 1586). Other globally recognised publishing brands include **Blackwell's** and **Elsevier** and there are numerous smaller independent firms and publishing technology providers such as **Publishing Technology plc**. The historic publishing sector has embraced the opportunities technology has provided to become a vital part of the county's digital sector. For example, 70% of OUP's revenue comes from digital publishing. Oxford is also a leader in publishing talent development, with **Oxford International Centre for Publishing Studies** at Oxford Brookes University one of the leading institutes for publishing education in the world, with a reputation for innovation and excellence in teaching and research. The recently launched **Confucius Institute at Oxford Brookes University** is developing links with China through professional Chinese Language Teaching training, designing and publishing books on Chinese themes and supporting international knowledge exchange.

- **Film, TV and Broadcasting:** Oxfordshire is a popular film and TV location, instantly identifiable across the world from the many Harry Potter Films and TV series including Morse and Downton Abbey. It is also home to numerous production and film technology supply companies and freelance production talent. The county's industry is well served by production facilities such as multi award-winning **Audiomotion Studios** whose motion capture service are also used by the gaming industry. There are post-production houses such as **The Hall**, as well as world leading media technology companies such as **Solid State Logic**, manufacturers of analogue and digital audio consoles and tools for film, audio, video and broadcast professionals.

NESTA ranks Oxford as one of the 12 major UK gaming hubs.

Thame Insight Share project – Oxfordshire County Council

Oxford is the **world headquarters and creative media campus for SAE Institute**, based at Littlemore Park. SAE Institute was founded in 1976 and has since grown to become the world's largest, industry-focused creative media educator with 54 campuses in 28 countries. SAE's curriculum has been carefully crafted in consultation with leading industry practitioners to meet the requirements of the global creative media industries. SAE Institute offers a comprehensive course portfolio in creative media fields (audio, film, animation, games development, music business and web) with a strong tradition of practical application and industry recognition. SAE Institute has a network across five continents with campuses in world centres of creative media industries including London, Berlin, Munich, Paris, Barcelona, New York, Los Angeles and more.

The UK gaming industry is estimated to be worth £1.7B with the strongest growth in digital.

- **Gaming:** Oxford is one of 12 major UK Gaming Hubs[40]. It is identified as being a 'consolidated' sector with a smaller number of companies employing larger numbers of people than some of the other hubs and with a stronger presence in console gaming. Oxford's games production sector is thriving with globally leading companies such as **NaturalMotion**, a University of Oxford spin-out, recently acquired by Zynga for US$527m. **Rebellion** is another leading games company, set up in Oxford in 1992, now employing over 200 people with a second office in Liverpool. There is also a strong supply chain for the industry. **Vicon** is a motion capture company supplying the gaming industry, along with Audiomotion (see above under film and TV).

Gaming – OxLEP

- **Cybersecurity and Big Data Analytics:** As well as nationally recognised cyber security academic research through centres such as the **Global Cyber Security Capacity Centre** and **Cyber Security Network** at The University of Oxford, there are a number of leading companies. These include **Sophos** - a major developer and vendor of computer security software and hardware used by 100,000 businesses in over 150 countries and **Nominet** – the biggest domain name registry in the UK. The sector is served by a number of high-end computing facilities and research organisations across the county such as the **Li Ka Shing Big Data** Institute and **Oxford Quantum**. 38 research teams work in quantum science, associated to the major science facilities of the **Diamond Light Source** at Harwell and the **Culham Centre for Fusion Energy**.

- **Music:** Oxford has produced some of the country's top bands, including Radiohead, Supergrass, Ride and Foals. The county has world-leading choirs, as well as music producers, engineers, and technologists, including **Solid State Logic**. **Oxfordshire County Council Music Service** is one of the largest and most active music services in the country supporting and encouraging young people's musical development. Arts Council England National Portfolio Organisation,

40.   Nesta (2014) A Map of the UK's Games Industry

Oxfordshire Youth Wind Band St John Fisher Primary School – David Brown

Oxford Contemporary Music, engages diverse local and national audiences aiming to deepen understanding and appreciation of musical cultures from within the UK and worldwide.

• **Design:** The design capabilities of Oxfordshire are intrinsically linked to the digital as well as the craft and individual artist/makers sub sectors within the county. Over half of the 804 software companies in Oxfordshire identified in the Tech Nation report are focused on design and development. Design is a key feature of many of the high-tech industries such as the motor industry and there is growing design in the wearable technologies sector in the county. Companies include **Waveoptics** (developers of wearables for augmented reality applications in the logistics, automotive, healthcare industries. Ideas and creations of small-scale designers feed the larger design and production companies); and creative design and development agencies, such as White October, One Ltd and Digital Remit, enable companies of all sizes to effectively market their products and services.

Oxfordshire Youth Music Theatre Production of Cats April 2016 -David Brown

• **Performing arts:** Oxfordshire has some excellent performing arts venues offering a diverse range and scale of work. These are presented in more depth in Section 5 below. There are leading performing arts talent development programmes across the county led by practising performing arts professionals. **Oxford Brookes University Drama** courses are among the most highly rated in the country; appearing in the top quartile of the Complete University Guide published in 2016, and the University of Oxford has some of the world's leading experts on theatre and performance research spanning Shakespeare to the

41.   Ralph Fiennes, Vanessa Redgrave, Michael Billington, Tom Stoppard, Kevin Spacey, Ariane Mnouchkine, Simon Russell Beale, Stephen Sondheim and many others have come to Oxford as guests.
42.   Clare Jones, BBC News 5 December 2015.

present day. **Oxford School of Drama** – rated in the top 5 drama schools in the world, **Pegasus Theatre's work with young people** and **Oxford Playhouse's** artist, youth theatre and Playmaker new writing programmes are supporting the development of new and emerging talent. The University of Oxford, and its many constituent colleges, also attract an extraordinary range of playwrights, directors, actors to inspire and give talks, sit on panels/ and take part in Q&A sessions[41], opening up an extraordinary range of expertise.

- **Visual arts and crafts:** Oxfordshire is home to hundreds of artists and crafts people and could become a centre for contemporary artistic development and excellence. The scale and scope of this creative subsector is demonstrated through **Artweeks**, which each year showcases and generates sales and profile for the artists and crafts people exhibiting in over 400 venues. The University of Oxford's annual **Ruskin Degree Show** attracts over a 1,000 visitors with **Oxford Brookes University**' Art Foundation, Fine Art and Masters End of Year shows also important events in the visual arts calendar.

The **Old Fire Station** workspace is one of the limited workspaces for artists and makers outside their homes. Early career artists struggle to stay in Oxford post training because of the lack of studio space and reluctantly drift off to London. Although cultural organisations provide formal and informal schemes to support professional development more could be done to co-ordinate the existing schemes and provide creative, technical and business support. As an organisation it has been recognised nationally as an example of good practice in terms of artistic offer and social inclusion, providing artistic activity and building resilience among vulnerable and disadvantaged people.

The listening room, Old Fire Station – James Sutton

Artists are working with organisation such as **Fusion Arts**, **OYAP** and **OVADA**, on programmes and initiatives to address a range of issues and agendas including young people's skills development, arts in health and art in the public realm – there are currently 45 public art projects underway across the county. **Modern Art Oxford**, one of the UK's leading contemporary art galleries, hosts a varied programme of exhibitions, talks, music and screenings for artists and their general audience.

The two universities are some of the biggest university investors in visual arts in the England. The University of Oxford comes top investing £8.9 million in visual art between 2010 and 2015. Oxford Brookes University is fifth with an investment of £0.5 million over the same period[42] but includes newly commissioned public art and work of its current students in the development of the new John Henry Brookes building.

"Resounding" Public Art – Oxford Brookes University

The creative and digital sub sectors are presented above as distinct sub sectors but they are increasingly integrated and convergent, with technology opening up and connecting different creative and knowledge industries, changing business models and delivery platforms. There is also significant cross over of the creative industries to other leading industrial sectors in Oxfordshire. For example, cutting edge design and technology is at the heart of the motorsport industry in 'Motorsport Valley' (in north Oxfordshire)[43] with its three Formula 1 teams leading the way in product design, and the UK space sector - another leading industry in Oxfordshire.

Partners including **Invest in Oxfordshire** and **Digital Oxford** are exploring the potential for improving the provision of **collaborative and flexible workspace for digital and creative entrepreneurs.** As yet these proposals are not fully worked up so a project proposal was not submitted for this CCHTIP. However, physical hubs supported by digital networks will play a vital role in connecting creative businesses to each other and the wider economy; and in enabling micro businesses to stay in the county and contribute to innovation and growth.

The OxLEP Skills Strategy will target graduates to retain a highly skilled workforce in Oxfordshire.

Creative and digital activities are also vital enablers for the cultural and heritage sectors. Digital technologies can be used in a number of ways both to promote the availability of heritage sites and attractions and to improve the visitors' experiences. Website design and the effective use of social media to promote heritage sites and activities across the county can be addressed by a wide range of leading-edge web design agencies and service providers, helping the heritage sites to build impactful video-rich websites, among other applications. To enhance the experience of visitors there are a number of innovative technologies that can be used such as 3D, virtual

43.   Lawrence Baretto (2013) Britain's Motorsport Valley – the home of formula 1, BBC Sport http://www.bbc.co.uk/sport/0/formula1/23048643

and augmented reality, which could show historical events and activities as immersive experiences with 3D glasses and VR headsets. The technologies for these are an integral part of the gaming sector in Oxfordshire, and it would be reasonably straightforward to broker collaboration between key companies in this sector and the cultural, heritage and tourism sectors.

The creative and digital industries are also a vital contributor of the broader knowledge economy – driving innovation and adding to the attractiveness of the county as a place in which to live, work and invest. However, as a relatively competitive location, talent attraction and retention can prove challenging – especially for SMEs and micro businesses which are unable to provide the kind of remuneration and location packages to attract mobile knowledge workers. A further challenge is staying ahead – connecting the incredible knowledge assets of the education sector to the innovation and business development agendas of a fast-moving industry. In addition, Oxfordshire's creative and digital sector would be boosted by contributions from an under-tapped talent base in areas of relative disadvantage which to date have not benefited from the county's creative success story.

Architecture - Oxford Brookes University

The **Oxfordshire Skills Strategy** sets out the ambitions and actions for ensuring highly skilled graduates within Oxfordshire stay in the area to meet the demand for the higher-level skills that the knowledge sector businesses require. The strategy also sets priorities for working with businesses to ensure their skills needs are met and that Oxfordshire's young people have access to training and skills that will enable them to succeed. Abingdon and Witney College in particular with its creative and arts specialisms, plays an important role here. In the top 10% of colleges in the country and among the top for 16 – 18-year-old apprenticeship placements and completions, the College has a strong reputation for innovation and excellence. Lecturers and support staff are leading experts in their fields, and most are still active practitioners themselves. Live TV is broadcast from the College each day with students leading the content production and transmission.

Two of the CCHT investment proposals focus on supporting the skills development of existing staff to nurture and develop the next generation of creative and digital entrepreneurs:

Oxfordshire Publishing Group at Oxford Brookes University International Centre for Publishing (003) proposes to continue the training programmes previously funded by Creative Skillset. This supports new and existing staff in publishing to develop digital and entrepreneurial skills. It also nurtures the next generation of publishing entrepreneurs and increases young people's overall literacy through engagement with schools.

Film Oxford's Young + Digital + Creative (009) is a rolling foundation programme in digital arts for 16 – 25 year olds not in employment education or training living in Oxfordshire. This will engage, develop and provide opportunities for 'hard to reach' young people whilst also identifying some of the most creative and diverse talent for the sector.

In addition to this three projects are closely linked to tourism and fall within the creative and digital sphere for development:-

CCHTIP010 Project Town Gown and County: The Oxfordshire Experience aims to create a new permanent exhibition/visitor attraction in the city that celebrates Oxfordshire using conventional and innovative display techniques.

CCHTIP026 Oxfordshire - A Digital Destination aims to provide an enhanced digital platform to promote the city and connect with visitors using digital apps specifically designed for the visitor.

CCHTIP027 Horrible Histories of Oxfordshire:- Experience Oxfordshire will develop a film with partners "Story of Oxford and Oxfordshire" that will market the whole country

All these projects demonstrate the importance of digital technology as an enabler in the future

Cornbury Festival ©Conrnbury Festival

5

Blenheim Palace South Lawn – Blenheim Palace

5.0 Cultural, Heritage and Tourism Sectors – Distinctiveness, Innovation and Quality

In strategic processes linked to growth and development, it is often easy to lose sight of what we are trying to achieve. The SEP makes it very clear that if we are to grow the economy and successfully absorb housing and infrastructure developments, then we need to focus on the qualities we already have. These are our people and our places, each of which forms a priority for the SEP. In this Investment Plan, we have also developed four priority themes, each of which complement these overarching SEP priorities:

- **Productive and Engaging Experiences**
- **Skills, talent development and business growth**
- **Creative Place-making**
- **Connectivity**

These themes are explored in more detail in Section 6, as sector shaping themes under which the investment proposals have been grouped.

Collectively, the CCHT sectors constitute the core offer for the Oxfordshire CCHT Prospectus. They are animated and energised by a dynamic and growing creative industries sector and many cultural and heritage organisations are working increasingly as creative businesses. But their core strength is the ways they bring people together, shape our distinctive places, and resonate so profoundly with visitors.

Oxfordshire is world-renowned for 1ts historic and distinctive places. Blenheim Palace is a World Heritage site; Oxfordshire has 1,500 Grade I and II listed buildings; 9 National Trust properties and 7 English Heritage sites.

Broughton Castel – Experience Oxfordshire

Mal Maison, Oxford Castle – Experience Oxfordshire

5.1 Heritage and Culture

The challenge in Oxfordshire is how best to describe, present and coordinate this diverse and extraordinary prospectus of CCHT assets. This is particularly the case because the heritage and cultural assets of the county are in a constant process of renewal, diversification and innovation. Even the oldest heritage assets and most established cultural organisations are working hard to stay relevant and, in many instances, stay ahead. For example, the development of Oxford's oldest building, **Oxford Castle** as a museum, heritage site and gallery, alongside a hotel and restaurant, has transformed the West End of Oxford into a commercially viable success story demonstrating what can be achieved through the right investment. Oxford Castle has ambitions to open up even more of the historic site to the public and to link to the wider transformation of Westgate.

UNESCO world-heritage site **Blenheim Palace** is not only an iconic heritage attraction with regular tours, it is a major events location available for hire and has its own programme of concerts and festivals, producing content and experiences which are certainly productive and engaging. Many other country houses are diversifying their offer to host events and cultural programmes, opening opportunities for cultural producers and creative businesses, while also offering important business to the county's creative and digital sector. In recent years it has also been estimated that the wedding business alone is worth millions to the local economy. In 2015 there were 2311 ceremonies across the county in some stunning heritage locations with fabulous landscapes, that hosted celebrities and an increasingly international clientel.

Oxfordshire is world-renowned for its historic and distinctive places. From the 'dreaming spires' of Oxford that have fired the imagination of scholars and visitors

The wedding business contributes millions to the Oxfordshire economy each year.

Jousting at Blenheim Palace – Blenheim Palace

Apollo Ashmolean Museum – Experience Oxfordshire

Ashmolean Museum – University of Oxford

for centuries, to the 1,500 listed buildings (more than twice the national average of grade I and II buildings); to the nine National Trust properties[44], seven English Heritage sites[45] and numerous independent homes and manor houses such as **Greys Court**. From the University of Oxford's historic colleges to the medieval streets, market towns and traditional villages, many reflecting the agricultural and industrial heritage of wool, textiles and transport to the University of Oxford's stunning group of globally recognised museums - **Ashmolean Museum of Art and Archaeology, Oxford University Museum of Natural History, the Pitt Rivers Museum, the Bate Collection of Musical Instruments, Museum of History of Science, the Bodleian Libraries**. Individually and collectively these museums are a huge visitor attraction receiving 2.25 million visitors a year, including over 120,000 school pupil visits.

Much of this CCHT offer is playing a leadership role nationally and internationally. For example, the museums are contributing to national and international thinking on the future of the sector as members of the **National Museum Directors Council** and through **Oxford Cultural Leaders**, a new international leadership programme for the cultural sector designed in partnership with the Said Business School to create a cadre of innovative, entrepreneurial and adaptive leaders.

TORCH (The Oxford Research Centre in the Humanities)[46] the flagship Humanities research centre at the University of Oxford is a hub for events that bring together groundbreaking research with community ventures. It provides an example of the cultural and heritage sector working as leading edge partners for Oxfordshire's wider creative and knowledge economy. TORCH's Knowledge Exchange programme brings together a community of scholars and researchers from across the 39 University of Oxford's Colleges. Collaborating with international academics and organisations, as well as organisations and communities across Oxfordshire, they are developing and sharing ground-breaking

44. Grey's Court, Nuffield Place, Buscot Old Parsonage, Buscot Park, Great Coxwell Barn, Priory Cottages, Chastleton House, and White Horse HillUffington and Badbury Hill.
45. Abingdon Museum, North Hinksey Conduit House, Uffington Castle, Waylands Smithy, Minster Lovell Hall, and the North Leigh Roman Villa and again Uffington White Horse Castle.
46. TORCH (2016) www.torch.ox.ac.uk

knowledge through interdisciplinary and cross-sector research and work. This has included work with the Mini plant and schools in the South East of Oxford.

The **Thames Valley Country House Partnership**[47] was established in 2013 and became part of the Knowledge Transfer Partnership in 2016. As a collaboration between the University of Oxford and a number of country houses of differing sizes and ownership structures in the Thames Valley, London & South East, and further afield it actively promotes innovative multi-disciplinary research into the history and future of the country house. This has the potential to transform the heritage sector and signals the opportunity to build on the heritage excellence of Oxfordshire and boost tourism growth in the future.

TORCH is proposing to develop Oxfordshire's Centre for Heritage Research and Engagement as a 'living lab' between the research excellence in Oxfordshire's universities and the Creative, Cultural, Heritage and Tourism sector with the aim to add value, improve visitor experience and create growth out of Oxfordshire's existing cultural heritage ecosystem (024).

University of Oxford Kellogg College Historic Towns & Villages Forum Market Town failure initiative (022) aims to boost tourism and develop skills and new businesses. Academics and researchers will work with local businesses and the arts and cultural sector on research into heritage tourism to increase day visits, stay visits, return visits and to explore and strengthen the connection with cultural and creative industry retail.

Other projects to enhance and secure the heritage sector for which 'worked up' proposals weren't received but that were highlighted through discussions include:

A 'views out' study for Oxford to analyse the main views that visitors enjoy of the Dreaming Spires and across the City skyline from the 6 heritage buildings/monuments in central Oxford. Oxford City Council is considering changes to the regulations that limit the height of buildings to create a new local plan that will cover development up to 2036. High rise buildings in and around Oxford could put pressure on the conservation of Oxford's iconic setting and skyline, jeopardising one of the main attractions for thousands visitors each year if not done sympathetically.

A co-ordinated approach to addressing the heritage assets 'at risk' in Oxfordshire - considering how buildings can be brought back into use as an important part of both preserving the county's heritage assets whilst ensuring that they make a positive contribution to the local economy.

Apprenticeships to train as archaeologists and other heritage specialists. There is a shortage of archaeologists and this will become an intense problem with the demands of recording archaeological heritage as more developments come on stream across the county and beyond.

47.   Thames Valley House Partnership (2016) www.tvchp.org

Dinosaur – Woodstock Museum

The **County, City and District Councils** are playing a vital role in the historic and contemporary cultural offer of the county – as funders, enablers and advocates:

- **Oxfordshire County Council's Museum Service, Oxfordshire Museum in Woodstock, and Oxfordshire History Centre** are opening up the heritage and history of the county to both visitors and residents, encouraging exploration, enjoyment and understanding of the county's history - from the dinosaurs of the Jurassic to contemporary creative industries. The **Museums Resource Centre**, near Standlake, has an extensive collection on the lives of past inhabitants of Oxfordshire's towns and villages – many mentioned in the doomsday book.

Children learning about dinosaurs at Woodstock Museum – Oxfordshire County Council

- **Cogges Manor Farm** in Witney is now run as a trust and helps people learn about the past and make a positive contribution to the environment, as well as playing an import role in educating people about production of local food.

Education at Cogges Manor Farm – Ric Mellis

Oxfordshire County Council is proposing a feasibility study (035) to explore a new business model to ensure the extensive and important collections of the history of the county can be opened up more widely. As the Oxfordshire Museum reaches its 50th anniversary this is the right time to explore the options for a redesigned business model to take the service forward for the next 50 years. The changing landscape of funding constraints, the size and make-up of the county's population, the ease and availability of personal transport, leisure activities, communications, education and employment together with the opportunities of digitisation makes this an ideal time for reassessment. Partnerships are central to the new emerging vision for the service.

The City and County Councils are also exploring the possibilities of integrating elements of the wider County collection into the plans for **redevelopment of the Museum of Oxford**. The Museum of Oxford's **"Hidden Histories"** Project will open up and share the heritage of the city's communities through stories that will make accessible objects currently in store, uncover archival records mapping the city's development and explore Oxford's intangible heritage through the memories of local people. The wider County collection holds artefacts that are central to the understanding of Oxford's rich heritage and provide evidence for key periods in history including Roman pottery industry, life in the medieval city, the Civil War and the development of the car industry as well as the broader social history of the City.

Cogges Manor Farm – Experience Oxfordshire

- In addition the county also benefits from a range of independent museums managed through a range of different business models.

- Oxfordshire has very active **amateur history sector**. It is also home to several leading historic trusts and charitable organisations, notably the **Oxford Preservation Trust** which manages the annual Oxford Open Doors event.

- **The County Library Service** works across its 43 libraries with partners including authors, story tellers, poets and musicians to promote the written, spoken and sung word and deliver diverse activities to attract, involve and inspire audiences. Throughout 2015 and 2016, Oxfordshire Libraries are leading and hosting the arts based activity and performance project Find Your Voice. This is collaboration with the Houses of Parliament, arts and cultural organisations, artists and young people coinciding with the 800th anniversary celebrations for Magna Carta, and linked to the campaign by UK Youth Parliament for votes for 16 year olds. The project builds from an Arts Council England funded research and development project with young people in 2014. It is also an example of the ways libraries can play a transformational role for cultural participation – engaging all communities and providing inspiring content and experiences that builds audiences for other types of cultural activity and which gives often the most vulnerable people a sense of belonging. Libraries are hubs and enablers for the cultural life of the County and operate as vital venues for the extensive network of local societies and groups. For example, the highly regarded Music Library is used by over 400 local music societies.

Find your voice Oxford Library – Oxford Mail

- **Oxfordshire Music Education Partnership** (OMEP) is one of the best music services in the country and is working to develop access, participation and education outcomes across the county. It brings together a group of 30 music education and service providers - between them providing specialist instrumental and vocal tuition, a wide range of bespoke projects, workshops, ensembles and continuing professional development packages in and out of schools. Over 10,000 children and young people each week engage in musical activities delivered through OMEP.

Oxfordshire County Youth Orchestra with choirs from Oxfordshire Primary Schools celebrating Britten's Centenary – David Brown

Oxfordshire Music Education Partnership has submitted an investment proposal to CCHTIP (034) to **build an effective and comprehensive website** to promote the work of the 30 strong partnership and ensure as many children and young people as possible have the opportunity to access the work of all partners.
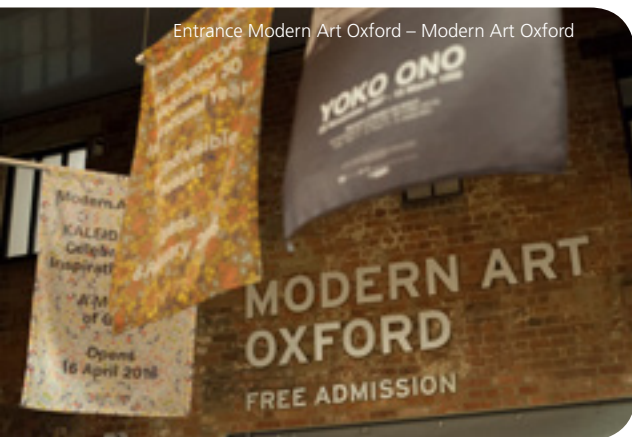
Entrance Modern Art Oxford – Modern Art Oxford

Oxfordshire has an incredible contemporary cultural offer, closely linked to and often delivered by an increasingly dynamic and outward facing heritage sector. Indeed, the **virtuous circle** described in Section one of this Investment Plan is dependent on productive and innovative cultural activities working across a range of venues and organisations, connecting with the past and generating new types of experience and contemporary senses of place. There are five Arts Council England National Portfolio Organisations (NPOs) representing all art forms - **Modern Art Oxford, Pegasus Theatre, Oxford Playhouse, Oxford Contemporary Music and Modern Poetry in Translation**. There are also several other key cultural organisation which play a development and leadership role – from the **Old Fire Station** in Oxford; **The Mill** in Banbury; **The Theatre** in Chipping Norton; **Unicorn Theatre**, in Abingdon; **Cornerstone** in Didcot and the **Kenton Theatre** in Henley-on-Thames, founded in 1805 and the fourth oldest working theatre in the country. All these artistic hubs deliver a range of programmes and activities from live performances by professional or amateur companies, to exhibition space, artistic hubs that benefit the local community. The county's community centres are another important asset offering a huge range of arts and cultural activities.

Both Oxford Brookes University and University of Oxford play a very significant role in the commissioning, production and presentation of contemporary cultural practice – and not just through its key museums and cultural venues of the latter (see above). For example, as part of the University of Oxford's TORCH, a new **College Space programme,** run in partnership with Oxford City Council, sees nine colleges opening up performance and rehearsal spaces to local arts group from across Oxfordshire. The scheme has got off to a successful start, providing much needed space for rehearsals and other activities for organisations such as **OVADA, Dancin' Oxford** and **The Story Museum**. There is a great deal of interest across the cultural sector to build on this relationship and extend it. The University is also working with members of the 50 strong network of amateur drama groups and operatic societies that are producing quality work led by communities all around the county. For example, TORCH and the AHRC (Arts and Humanities Research Council) have jointly invested in two drama-based Cultural Engagement Projects in the spring-summer 2016: 'Connecting Oxfordshire Theatres' and 'Multilingual Drama in Schools.' These projects fund two postdoctoral fellows to work with the Principal Investigators (Professor Kirsten Shepherd-Barr and Professor Karen Leeder) to develop and implement innovative

Education day children drawing – Modern Art Oxford

Story Museum September 2015 – A Walmsley

working partnerships with local theatres and schools. Professor Laura Tunbridge is using her Knowledge Exchange to work with the **Oxford Lieder Festival** on their 2016 Schumann project and Professor Wes Williams worked with **Pegasus Theatre** on 'Storming Utopia', a project designed to engage a range of people in discussions about ideal communities, and the relation between Thomas More's Utopia, Shakespeare's Tempest, and Oxford today.

Organisations such as **The Old Fire Station** and **OVADA** are playing an important role in nurturing communities of contemporary cultural practice – supporting artist development, providing space for creative professionals, and reaching out to new audiences across diverse communities. Other organisations like **Fusion Arts, Film Oxford** and **OYAP** are focusing on work with young people and next generations of active audiences and creative entrepreneurs. Such organisations are vital to the health of the overall cultural life of the county and they build bridges between commercially viable professional practice and place-enhancing cultural participation. They also help to promote the county as a rich and engaging cultural place, which helps to diversify the tourism offer and enhance the county as a place to live and work.

Film Oxford has proposed the creation of a new Film Officer role that combines the promotion of the city and county to the film industry, develops new tourist attractions around film locations and develops work experience opportunities for local young people connected to films (008).

Oxfordshire's major cultural organisations are constantly in a process of renewal, exploring new ways to engage audiences, testing different ways to commission and present cultural work, and actively seeking to influence the creative economy of the county. Modern Art Oxford, the Story Museum and Museum of Oxford, neighbours in central Oxford, all have ambitious growth and diversification plans. These are geared toward both enhancing the visitor experience and developing their potential as innovators and cultural producers – delivering value to the creative industries of the county together in a developing cultural quarter.

Investment proposals from **Modern Art Oxford** (015) and the **Story Museum** (029) for major redesigns and refurbishment of their buildings would see these two organisations improve and extend the visitor experience through the new and enhanced spaces and facilities the developments would provide. In addition the proposal by Oxfordshire County Council to explore a **Redesigned Business Model for the Museum Service in Oxfordshire** (035) would bring the historical and archaeological collections together to tell the story of Oxfordshire. Together they will be able to more effectively position and project the cultural offer in this distinctive part of Oxford city centre.

Examples of some of the ambitious expansion plans for key cultural organisations include:

The **redevelopment of Banbury Museum** and a wider opportunity to establish a productive cultural hub in the town (e.g. via Banbury Canalside) (030).

Development plans at The Mill in Banbury extending the cultural infrastructure to engage and entertain the growing population in the north of the county (no proposal submitted to this CCHTIP but development ambitions discussed during interview).

Banbury Museum – Experience Oxfordshire

The cultural assets of Oxfordshire are not limited to building based organisations or tangible heritage offer. Oxfordshire has a very extensive and diverse festival economy. The county is home to numerous events and festivals growing in both scale and ambition. Festivals are so important for the cultural health of Oxfordshire and particularly key to establishing productive and engaging experiences and shaping high quality places. This is because they thrive through live and often freshly commissioned content; they attract crowds who bring with them positive energy; and they generate spillover effects to the wider economy – including in tourism and associated services. Among the leading events taking places in multiple venues and open spaces across the county (and demonstrating some of the exemplary partnership work across the county) are:

- **Artweeks** involving hundreds of Oxfordshire artists and crafts people.
- **Oxford Open Doors** led by Oxford Preservation Trust in partnership with The University of Oxford and others - opening up over 200 usually unseen spaces to over 70,000 visitors a year.

- **Alice's Day**, an annual celebration of the children's literary classic. Since its inception in 2007, Alice's Day has grown into one of Oxford's major cultural events, celebrating the literary heritage of the city. Co-ordinated by The Story Museum, Alice's Day events workshops, screenings and performances are held in over 20 venues in and around Oxford.

- Multiple cross-art-form events such as **Dancin' Oxford**, a year round dance programme and annual festival which establishes Oxford as a recognised hub for vibrant dance activity; **Cowley Road Carnival** annual street carnival; **MCS Arts Festival**, celebrating the city's rich history and thriving culture though over 100 summer events.

Young Alice, Oxford Castle – K T Bruce, Experience Oxfordshire

Cowley Road Festival Silk Butterfly – Greg Smolonski, Experience Oxfordshire

- Oxford's **2016 Shakespeare Festival** is the biggest and one of the most ambitious cross sector partnership events the city has hosted. It is part of the national celebrations to mark 400 years since the death of the playwright, poet, actor, and arguably the greatest writer ever in the English language. From March to December, Shakespeare's life, work and legacy will be celebrated across Oxford in a festival of dance, drama and music performances, talks, exhibitions, concerts, conferences, films, poetry and youth projects. Oxford's Universities, schools, local authorities, cultural and heritage organisations and creative businesses are collaborating on this extraordinary 10-month festival[48] Oxfordshire County Council has received ACE funding for their Wanted: Shakespeare, Dead or Alive project which will see organisations such as English National Ballet, Dancin' Oxford, Creation Theatre, Flintlock Theatre, Oxford Poetry Hub, and animation artist Thomas Cross performing and creating participatory activities in libraries and venues across the county.

- **Oxford Christmas Lights Festival** attracts over 100,000 visitors to the three-day event. Produced by Oxford City Council's Culture Team in partnership with nearly 30 cultural organisations in the city, the festival includes a stage and large festive market in St Giles throughout the weekend, a beautiful Lantern Parade including local schoolchildren on Friday evening, Day of Song - choir performances on the Sunday and a

48.   Leading partners in the festival include the Bodleian Libraries, the University of Oxford English Faculty, Blackwell's Booksellers, Oxford University Press and Experience Oxfordshire. They will be working in collaboration with Oxfordshire County Libraries, Oxford Playhouse, Creation Theatre Company, The Story Museum, Pegasus Theatre, Oxford Preservation Trust, Museum of Oxford, The North Wall, MCS Arts Festival Oxford, Dancin' Oxford, Flintlock Theatre Company, Music at Oxford, SJE Arts, TMD Productions and many more.

multitude of cultural partner activities and events programmed across the city. This event has become a highlight of the City's cultural calendar and has the potential to become a flagship event at the end of November attracting a wide ranging audience and supporting local business.

Oxfordshire Artweeks submitted a proposal to involve shops and businesses in town centres in programming and presentation of art - to increase footfall for them while also opening up Artweeks to a new town centre audiences (006). This fits neatly with the new Business Improvement District in Abingdon – culture as a way of diversifying the town centre offer, attracting business through audience activity and tourism.

The festival scene is also growing and diversifying, with newer events like the **Oxford Fringe**, in its third year, and **Photography Oxford**, set up in 2013, adding to the cultural calendar. **Common People**, a music festival by leading festival organiser Bestival, will be coming to Oxford for the first time in May in 2016. This burgeoning festival economy presents a real opportunity for Oxfordshire and can drive significant elements of sector development which delivers outcomes for the growth of the Oxfordshire economy. However, to maximise the value of the festivals sector requires greater coordination and collaboration - in programming, audience development, production, promotion and commissioning. This is why, as one of the major recommendations for this Investment Plan, an Oxfordshire Festival of Festivals is proposed. **Experience Oxfordshire**, could potentially lead on the co-ordination and joint promotion of events across the city and county thus, connecting and expanding the cultural offer, building from current strengths, mobilising collaboration and generating a more visible and accessible offer overall (see **Section 6**). An example of how festivals are already working together to maximise visitor numbers is the **Oxford in June** partnership of festivals which includes **Magdalen College School, Low Carbon Oxford, Oxford Bike Week, the Science Festival, Tandem and the Festival of Nature**.

Cornbury Festival ©Cornbury Festival

Some examples of investment proposals to extend current events and festivals or create new ones that could become part of an extensive Festival of Festivals package include:

Extending the well-established **Oxford Open Doors** (011) across the county engaging a whole new audience with often hidden heritage assets.

A programme of cultural experiences and activity proposed by **Oxford University Museums Partnership (on behalf of Academic Services and University Collections)** including an Oxford Festival of Ideas, The Oxford Cultural Mile, Hidden Oxford – the museum without walls, and a Contemporary Art and Science exhibition programme (005).

Embedding the **Magdalen College School Arts Festival** as a major attraction across the city through new online platforms and broader digital strategy plus additional outreach, engagement and education projects for young people and communities least likely to engage with arts and cultural activity (032).

Bampton Church – Experience Oxfordshire

All the organisations across the city and county and the huge range of activities they offer, create the very fabric of Oxford and Oxfordshire as places for locals and visitors. Together they make a vital contribution to the quality of life of the area and are what makes the city and county so popular with visitors. There is huge potential to build on this incredible breadth and depth of offer.

The map in **Figure 5** below highlights the range and variety of cultural and heritage assets across the county. It is a purely illustrative tool – the offer is so extensive it cannot be presented in full via a comprehensive map in the main body of this Investment Plan.

Figure 5 – An Illustration of Oxfordshire's CCHT Offer

West Oxfordshire

- With two main **heritage and cultural clusters in Chipping Norton and around Woodstock.**
- **A range of smaller arts and crafts spaces** such as the Owen Munford Gallery (part of the Theatre) and Albion Gallery Oxford.
- **Blenheim Palace**, one of Oxfordshire's world-renowned heritage sites has a programme of festivals and events including the Literary Festival and the Nocturne music concert.
- **Woodstock has a small cluster of museums, galleries and events** including the **Oxfordshire Museum, the Junction Art Gallery, Iona House Gallery and the Woodstock Festival**.
- Other assets include **Asthall Manor**, with an active programme of events including On Form, the only exhibition in the UK dedicated exclusively to stone sculpture.

Cherwell

- The district is set to see the **largest housing developments** in the county in and around Bicester and Banbury. **The cultural sector will play a major role in enhancing the quality of growth**. To the north, major assets include the **Banbury Museum** with its ambitious expansion plans, the **Mill Arts Centre**, which is also looking to expand and the **new Library in Bicester as part of a mixed-use development in the town**.
- **Banbury Folk Festival** started in 2000 as a one-day event but has grown into a full weekend attracting major artists and folk enthusiasts from all over the country. Other festivals in the district include the **Truck Festival, Wood Festival and the Wilderness Festival**.
- **Bicester Village** is one of the UK's premiere visitor attractions with over 6 million visitors a year.

Vale of White Horse

- Cultural and heritage attractions include **Abingdon Abbey and Museum, Uffington Castle, Uffington White Horse, Wayland's Smithy, and Ashdown House**.
- The district is also home to the **Runaway Fair, the Michaelmas Fair, and the Unicorn Theatre - a small theatre ' for the whole community'.**

Oxford City

- **A portfolio of world-class heritage and cultural assets with 5 NPOs** representing all art forms (Modern Art Oxford, Pegasus Theatre, Oxford Playhouse, Oxford Contemporary Music, Modern Poetry in Translation; University of Oxford Museums)
- **An outstanding museum sector** embodied in the seven University of Oxford Museums and Collections **(Ashmolean Museum of Art and Archaeology, Oxford University Museum of Natural History, the Pitt Rivers Museum, the Bate Collection of Musical Instruments, Museum of History of Science, the Bodleian Libraries and Botanic Garden).**
- **A wide and diverse range of both emergent and established cultural organisations** for local communities, students and international tourists, such as the Old Fire Station, OVADA, the Story Museum, the Jam Factory and The North Wall Arts Centre among many others.
- **A growing programme of festivals and events including**, among others, Alice's Day, Dancin' Oxford, MCS Arts Festival Oxford, Oxford Fringe, Oxford Open Doors, Shakespeare Oxford Festival 2016, and Cowley Road Carnival.
- **A varied and dynamic mix of digital and creative networks, meet ups, clubs and associations.**

Cherwell

West Oxfordshire

Oxford

Vale of White Horse

South Oxfordshire

South Oxfordshire

- **Multiple heritage and cultural attractions**, with small centres of activity in **Didcot, Henley and Wallingford**.
- In Didcot, **Cornerstone Arts Centre**, opened in 2008 now provides a wide programme of performance, participatory activities, exhibitions in the venue and the wider community.
- Henley has the annual **Henley Festival and the Rewind Festival South**. It is also home to a range of heritage sites including **National Trust Nuffield Place**, former home of Lord Nuffield the founder of the Morris Motor Company and River & Rowing Museum.
- Across the district there are many country and historic houses and transport history museums such as the **Aston Martin Heritage Museum, the Benson Veteran Cycle Museum and Didcot Railway Centre**.

5.2 The Natural and Rural Landscape

For all its growth and development, Oxfordshire is still one of the most rural counties in England. It is also a county of real diversity from upland Cotswolds to the lowland Thames Valley, from huge sweeps of intensive arable land to ancient pre-Christian burial grounds. The natural and rural assets play an important role in the heritage and cultural offer and are a major tourist attraction that includes three Areas of Outstanding National Beauty the Chilterns, Cotswolds and North Wessex Downs.

The Ridgeway, Wantage – Experience Oxfordshire

An act of Parliament in 1949 first gave provision for National Parks and Long Distance Routes to be created, with The Thames National Trail finally coming into being in 1997. Stretching over 184 miles, part of the route passes through the southern reaches of Oxfordshire alongside the iconic River Thames which plays an important role attracting visitors to the countryside. Passing close by numerous villages, historic market towns, skirting the city of Oxford and including many places of interest opens up opportunities for business in rural areas. The landscape is enjoyed by walkers and tourists on days out along the river, or on weekend breaks enjoying the natural wild environment or exploring the historic cultural assets which are scattered along its length.

The Church of England now promotes the Thames Pilgrim Way which takes in the Thames Path and gives walkers the opportunity to visit places such as the famous Bampton Church that appeared in the popular TV series "Downton Abbey". The church is now investing in its historic churches and diversifying to offer overnight stays and rents its many halls for important events. It is keen to develop and attract new business and sees the development of circular walks as a positive development to attract more people into rural areas to enjoy the surroundings which in turn improve the quality of life and promote opportunities for health and wellbeing.

If the historic ferry crossing at Bablock Hythe is opened once more in West Oxfordshire, there will be opportunities to develop the reservoir and nature reserve facilities for all to enjoy, and is a key strategic network aspiration for the adopted Rights of Way Management Plan 2015-2025.The environmentally friendly, pedestrian/cycle ferry will open up a substantial section of riverside public right of way, improve connections between villages each side of the Thames and also help put a substantial section of the Thames Path National Trail on

Narrow Boats Oxfordshire – Experience Oxfordshire

a riverside route. Indeed West Oxfordshire are trying to secure funding to identify 5 circular walks that could link towns and villages such as Bampton and Clansfield providing access to shops, pubs/inns from The Thames Path.

The Uffington White Horse is a stylised prehistoric horse 110 meters in length carved into the scarp of White Horse Hill from deep trenches filled with crushed white chalk. The figure dates from later pre-history around the Iron Age or Late Bronze Age (1000-700 BC). Owned and managed by the National Trust and a Scheduled Ancient Monument, it attracts thousands each year. The best views are from the air but the figure which has been likened to Celtic Art can also be seen across the vale from the picturesque villages of Coxwell, Longcot or Fernham.

Uffington White Horse – OxLEP

The Canal and River Trust and Thames National Trail have the opportunity to work together to broaden the visitor offer in rural areas of the county. The natural and rural landscape is a major cultural asset and its sensitive management will be key to effective and sustainable growth. These assets and the evidence for investing them is presented in the Oxfordshire's Strategic Environmental Economic Investment Plan (SEEIP), a sister Investment Plan to this one.

Three proposals for investment in this CCHTIP are also included in the SEEIP, providing co-investment opportunities across the two plans. (001) Promoting the Tourism Offer of Oxford's Rural Hinterland, a proposal from **Cotswolds Conservation Board, Chilterns Conservation Board, North Wessex Downs AONB Partnership**, (002) Earth Lab – a new innovation, skills and visitor centre at Earth Lab's south Oxfordshire base and (012) a proposal from the **Canal & River Trust** for the upgrading 6.3 km of the Oxford Canal's towpath – the OxCan Cycle Path.

A further two proposal to the CCHTIP also promote the rural visitor economy: **The Oxford Canal Walk** a proposal from the Canal & Rivers Trust (013) that aims to make it easier for non-car visitors to access rural tourism and overnight accommodation along the canal trail. **A Virtual Art Gallery along the River Thames** (033) is proposed by Thames Path National Trails.

Blenheim Palace view – Blenheim Palace

5.3 Growing the Tourism Economy in Oxfordshire: Harnessing the Wealth of Creative, Cultural and Heritage Assets

Oxford is a globally recognised destination. Correspondingly, tourism is a key part of the city's economy and it generates spillover effects for the wider economy of the county. Oxfordshire has some very significant and hugely successful tourist attractions and the sector is set to play an increasingly vital role in its economy as partners more effectively harness the creative, cultural and heritage assets that make the county such a uniquely appealing place. Tourism is a sector that simply would not exist without the cultural and heritage assets that spark visitor interest, or without the dynamic blend of heritage and contemporary cultural life that make places distinctive, engaging and attractive. This is why a holistic approach to tourism development is so vital – maximising the virtuous circle of development where tourism and the creative industries derive much of their quality, innovation and growth through the active conversion of value in the cultural and heritage sectors.

Experience Oxfordshire is the Destination Management Organisation (DMO) for Oxfordshire. It promotes the county, products and experiences to local, national and international markets. It plays a vital role not just promoting but also connecting the huge diversity of attractions to millions of existing and potential visitors. The opportunity exists for it to play an even greater role – with the right investment - as the co-ordinator, lead organisation and key delivery partner for this Investment Plan. This is to ensure that activities across the above-mentioned virtuous circle are effectively brokered and coordinated, with Experience Oxfordshire well placed to re-invent destination management so that it operates in a holistic way across related sectors and so that it is as much about sector development as it is about communicating the offer and making it accessible to core markets.

A core proposal that will help to achieve the above is investment in **Experience Oxfordshire's** to play a leadership and co-ordination role, as put forward in their CCHTIP proposal 019. This is to develop and improve the organisation to become a thriving sustainable Destination Management Organisation (DMO) and more to enable it become the major delivery partner for the CCHTIP.

As we show below and have described throughout this Plan, there is so much to build from, with tourism growth vital to growth across the Oxfordshire economy; and tourism growth dependent on a dynamic, connected, collaborative and innovative creative, cultural and heritage sectors.

- **Oxfordshire attracts 26.8 million visitors a year. These visitors spend £1.86 billion in the local economy, supporting 32,000 jobs, 10% of the county's workforce.** The sector is of huge importance to the economic stability and diversity for Oxfordshire. Visitor expenditure breaks down as follows:

  Accommodation 13%
  Retail 28%
  Attractions/Entertainment 10%
  Transport 18%
  Catering 31%[49].

- **Oxford City is the 8th most visited city in the UK**[50]. This offers so much potential for further growth. For example, only 10% of visitors, to the county, stay overnight and less than a quarter of overnight stays are by international visitors[51]. More integrated marketing of the city and county assets will help to encourage visitors to Oxford to travel beyond the city boundary and stay to experience some of the incredible countryside, history and culture the county has to offer. Key here is also the development a range of new accommodation for the increased visitor numbers.

- **Oxfordshire is world renowned for heritage, culture and areas of outstanding natural beauty**. The spires and historic colleges of Oxford, the UNESCO World Heritage site of Blenheim Palace; 2,500 miles of public rights of way, including the Thames path and Ridgeway National Trail; the international Henley Royal Regatta and Cotswolds, North Wessex Downs and the Chilterns AONB's.

Bridge of Sighs – University of Oxford

- **Bicester Village is a remarkable success story**, growing rapidly to become one of the most visited attractions in the UK. It is estimated that three out of every

49. Tourism South East Research Unit (2015) The Economic Impact of Tourism on Oxfordshire Estimates for 2014.
50. VisitBritian 2015.
51. Tourism South East Research Unit (2015) The Economic Impact of Tourism on Oxfordshire Estimates for 2014.

Bicester Village is one of the most visited attractions in the UK. The new Bicester Village train station opened in 2015 and gives direct access to London Marylebone.

Bicester Village – Experience Oxfordshire

four Chinese visitors to Britain travel to Bicester[52]. Proximity and ease of access to London are clearly contributing to its success and the opening of the new Bicester Village train station by Chiltern Railways in 2015 now gives direct access to London Marylebone. The opportunity is to attract a proportion of these visitors to explore other attractions in Bicester and across the county such as **The Cotswold Wildlife Park** and **Crocodiles of the World**, positioning Bicester and other 'tourist magnets' such as Oxford City and Blenheim Palace as 'gateway attractions' to a wider programme of visitor opportunities.

Research by the British Council on the attitudes of young, educated people in Brazil, China, Germany, India and the USA (some of which are key target audiences for Experience Oxfordshire) highlighted how art, culture and the creative industries rank at the top, or near the top, in terms of the characteristics that make the UK particularly attractive.

- 42% of respondents felt cultural and historic attractions made the UK an attractive place to visit (the most cited reason),
- 39% said 'cities' (second most cited)
- 36% said 'arts' (third most cited).

Clearly, the strength of both the UK's history and culture, combined with the vibrancy of the arts sector and qualities of its heritage sector, makes the UK – and cities and counties within it - particularly attractive to potential tourists[53].

52.   Graham Ruddick, (2015), The unlikely spot for designer holidays where the world shops, The Telegraph, online
53.   British Council, (2014), As Others See Us: Culture, Attraction and Soft Power

River Thames – OxLEP

A significant proportion of growth potential in the visitor economy lies in the overseas market, so Oxfordshire needs to attract more international visitors to stay longer and spend more. However key areas to support this growth will involve investment in new accommodation particularly 5-star hotels to support the luxury market, and a hotel development with 300-400 bedrooms to attract the corporate market that could potentially host large conferences in one location. The county currently lacks capacity to meet demand which limits the opportunities for visitors to explore, stay and experience more of what Oxfordshire has to offer.

Buscot Park – Peter Augur, Experience Oxfordshire

Without strong partnership working and very committed engagement across the CCHT sectors, Oxfordshire's tourism sector although strong, will remain under-leveraged. Experience Oxfordshire has already achieved a lot on a limited budget by networking closely with the private sector to achieve investment and growth, and by brokering collaboration between the public, private and voluntary sectors. The opportunity now is to build on this overarching development role.

Experience Oxfordshire: Working cross sector to ensure Oxfordshire is a leading destination for tourism, culture and business.

Partnership is at the core of Experience Oxfordshire: There are over 200 partners - hotels, transport providers, restaurants, heritage houses, museums, country parks and cultural organisations. The Experience Oxfordshire board is made up of partners from the city and county's leading tourism, cultural and heritage professionals, meaning that the majority of its work is delivered through collaboration.

Through their work, Experience Oxfordshire reaches huge numbers of leisure and business visitors running marketing campaigns, online, in print and through Oxford's Visitor Information Centre. They have over 15,000 social media followers, 10 million visits a year to the new website:
www.experienceoxfordshire.org
(nearly 3 million unique visitors) and Visitor Information Centre attracts 540,000 visitors a year.

A vibrant cultural life in Oxfordshire is crucial for attracting leisure visitors and business to Oxfordshire. Experience Oxfordshire works with arts, cultural, heritage and creative organisations to promote an exciting programme of festivals and attractions to engage local, national and international audiences.

Examples of some of Experience Oxfordshire's Partnership programmes:

Oxfordshire's 2016 Shakespeare Festival: Experience Oxfordshire is a lead consortium partner with The University of Oxford, Blackwell's Books and Oxford University press in the Oxfordshire's festival to celebrate 400 years of Shakespeare that will see hundreds of events and activities from March to December.

Attractions Working Group – Experience Oxfordshire leads on pulling together attractions with varying focus and interest to find areas of mutual benefit and collaboration.

MEET Oxfordshire – a dedicated section within Experience Oxfordshire that focuses on the Meetings, Incentives, Conferencing and Events (MICE) market. Bringing partners together to service this sector is key and the Cultural activity forms much of the focus.

Experience Oxfordshire is also a key member of the Oxford Cultural Partnership led by Oxford City Council. The partnership of cultural organisations works to raise the profile of Oxford as a contemporary and heritage destination.

Experience Oxfordshire's primary aims are to:

- Raise the profile of Oxfordshire as a must see visitor destination.
- Ensure that Oxfordshire is a great destination to live, work, visit and do business.
- Work with businesses to grow and develop the visitor economy.

A "Discover England Fund" will be launched in 2016. Partners will be encouraged to work together across boundaries and geographies to develop iconic tourism trails. (DCMS Culture White Paper, 2016)

Eynsham Hall – Eynsham Hall

If Experience Oxfordshire was successful in achieving proposed funding – particularly through proposal 019 – then with cross sector collaboration the following could be achieved:

- increase tourism spend in the county 5% year on year so that by 2030 the value exceeds £3.5billion, thus doubling the value of the visitor economy.
- increase inbound tourism by 40%.
- reposition Oxford to be ranked in the top 5 in the UK for inbound tourism.
- create 10,000 additional jobs in the visitor economy.
- reposition the domestic tourism proposition to ensure that Oxfordshire is in the top 20 of English destinations for a day visits.
- extend average visitor lengths of stay.

Cowley Road Festival – JJ Moore, Experience Oxfordshire

Oxfordshire is well connected with excellent access to the coach and rail network, and links into the motorway system and international airports including Heathrow and Birmingham.

Figure 6 – Map of Oxfordshire's Transport Network
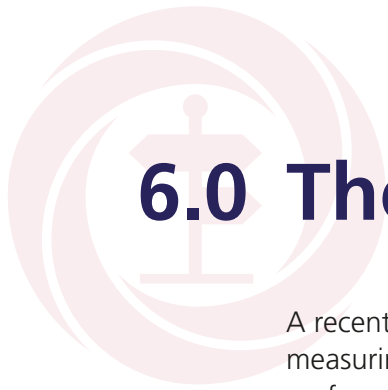
6.0 The Investment Proposals

A recent report by Price Waterhouse Coopers found Oxford at the top of a table measuring economic performance of 36 cities[54]. The report measured economic performance against a range of categories defined by the public as key to economic success and wellbeing including income, health and work-life balance – the latter two strongly influenced by the creative, cultural and heritage offer. This demonstrates the importance of coordinating investment across related sectors – as the virtuous circle model implies. It also demonstrates the direct significance of these sectors to the overarching growth agenda.

One core finding of this Investment Plan is the huge diversity of the CCHT sectors of Oxfordshire. They are internally diverse in terms of the range of activities, organisations, businesses and assets within each 'sector'. The profile and dynamics of the sectors also vary enormously in each place but collectively they generate economic value, with each part playing a development role. A recent study for Arts Council England et al[55] describes the spillover effects of public investment in culture and the creative industries. A core argument here is that economic growth and competitiveness is not only provided by the more commercially focused and scalable creative industries businesses, but by the full diversity of organisations and businesses working across the sectors in ways that are increasingly interdependent. Overall, it is absolutely clear that the CCHT sectors are central to the growth and competitiveness of the county, as well as to its quality of life and distinctiveness.

The consultation process for this Investment Plan has enabled the development of this overall value proposition for Oxfordshire. The multiple interviews, focus groups and, in particular, three major workshops, were vital in mapping the landscape and in shaping the priority investment themes for CCHT in Oxfordshire. Two very well-attended and engaging workshops were held at critical stages in the research process - at Bicester Golf and Country Club and at Blenheim Palace. These were followed by a final workshop in Oxford, where the main themes for the Investment Plan were tested and the 35 investment proposals discussed.

The priority investment themes developed through the Plan and introduced in **Section 5** above, are introduced in more detail below. Each is then followed by a short summary of the investment proposals relevant to and clustered against the investment theme. A summary of the Investment Proposals is given at **Appendix 2**. These proposals provide exciting opportunities for investment that will ensure the CCHT sectors play a very important role in delivering on the strategic agendas of OxLEP.

However, this Investment Plan represents the beginning of a journey where partners will review the proposals and build a case to Government and other investment partners for a coordinated approach to the sectors across Oxfordshire. This will include a process of connecting similar proposals and encouraging a more collaborative

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54.   OxLEP, (2015), Oxford tops Good Growth for Cities Index, OXLEP online.
55.   Tom Fleming Creative Consultancy (2015), Cultural and creative spillovers in Europe: preliminary evidence review, Arts Council England, ecce, Arts Council Ireland, European Cultural Foundation, and European Creative Business Network.

approach for organisations with similar development agendas. It will also include the active pursuit of additional proposals – to bridge gaps in the current list (such as related to the creative industries for which there were very few proposals) and encourage new ways of working across the county.

The 35 investment proposals are therefore the first stage in a longer-term process to more effectively coordinate investment across the county and ensure that the CCHT sectors effectively deliver on the virtuous circle of value creation described in this Plan.

6.1 Priority Investment Themes

Below we set out our priority themes, the assumptions that underpin them, and the types of development opportunity they present to investors, strategic partners and the sector as a whole[56]. Under each theme we introduce 'clusters of investment proposals' received through the open call. This is because clear trends were apparent in the types of proposal submitted and the agendas they supported. We also present some additional proposal concepts which were not submitted as formal investment proposals but which have been introduced through the wider consultation and research process.

Collectively, these proposals present an opportunity to bring partners together so they can cluster around priority themes to further develop proposals, calls for additional proposals and set out opportunities for growth. Delivery and governance proposals are introduced in **Section 8**.

Wantage – Experience Oxfordshire

56. It should be noted that in themselves these proposals present the start of a process of sector coordination and development. They will in turn be developed, consolidated and will attract additional interest from partners who did not submit proposals in response to the open call.

6.1.1 Priority Theme 1: Productive and Engaging Experiences

Oxfordshire has the **potential to connect its productive and innovative cultural and creative sector to its destination management and visitor experience offer.** This is in terms of the ways the offer is communicated, the quality and interactiveness of the experience, and the specific experiences offered (i.e. the full diversity of the county). Tourism is increasingly an interactive and immersive activity, with the visitor and the host interacting to co-create experiences. A successful tourism economy depends on rich and dynamic creative industries, and an outstanding cultural and heritage sector – with new cultural products being developed and the creative reinterpretation of heritage vital to opening up access and increasing the depth and quality of the experience.

From the investment proposals submitted through the development of this Plan, plus our wider consultation with the sector and crucially informed by best practice elsewhere, Three Strategic Opportunities for Oxfordshire have been identified:

1A. A collaborative innovation programme: for cultural and heritage organisations, creative and tourism businesses, and partners in education (including the city's two universities), technology, science and other key areas: to accelerate innovation for all sectors and lift the quality and performance of culture and heritage sectors. Oxfordshire has enormous potential to attract a greater number of higher spending 'cultural tourists'.

The opportunity here is to more effectively communicate the multiple narratives of city and county and find ways for them to offer a coherent, accessible whole. This would be led by Experience Oxfordshire, working with organisations across the CCHT sectors to coordinate the way the offer is communicated and programmed. Digital technology can play a vital role here – e.g. reinterpreting and reanimating the heritage offer, providing more legible and navigable ways to explore the CCHT of the county on-line and via digitally enabled interfaces with different elements of the cultural and heritage landscape. Digital technology can also help to make audience and visitor experience more interactive and personalised, with big data shared through the CCHT sector enabling greater reach and engagement and a more rewarding customer experience. This would include scaling up existing good practice and exploring new ways to unlock capacity, expertise and ideas.

1B. Festival of Festivals: The festivals sector in Oxford is a brilliant asset, but it is under-connected and thus under-leveraged. A clear and high quality programme of festivals and events – collectively supported and connected to shape an 'Oxfordshire Festival' proposition (with different festivals feeding into a high profile, globally excellent core festival season). Oxfordshire is already a county of festivals – offering real diversity in scale and focus. Festivals and events are great ways of developing a sector without the higher risks of physical infrastructure. They offer the platform for talent development, experimentation, showcasing, collaboration and – of course – they can be major draws for tourism. The festival sector is also vital for commissioning new content – giving the creative industries a platform to showcase their work and generate revenue from it; and developing new revenue streams for the cultural and heritage sector.

Animals Story, Story Museum – A Walmsley

The festival sector in Oxfordshire is poised for growth and can play a more extensive strategic role in driving growth and innovation across the sector. This Festival of Festivals programme would see a co-ordinated approach to skills development, programming, promotion and the pursuit of investment (e.g. sponsorship). It would see new programming to connect existing festivals, and it would involve a pan-festival brand and promotional campaign – with festivals a leading part of Experience Oxfordshire's increasing role as a leader and broker of sector development.

1C. The most innovative and accessible creative and culture-led place-making and destination-management in the UK. This would be underpinned by a coordinated approach to destination management – led by Experience Oxfordshire - with dedicated resource bringing CCHT sectors together through a package of products/services as an accessible, engaging and innovative overall offer.

For example, Oxfordshire has some of the most progressive cultural organisations in the UK in terms of accessibility – in the museums, galleries, stately homes and open spaces. There is so much potential here to go to another level and open up the cultural infrastructure – to enable deeper and richer experiences. With an ageing population, the market for 'beyond accessibility' is growing rapidly. This is just one potential opportunity for the cultural organisations and creative businesses of the county – to be a pathfinder for an accessible, smart and interactive place. This is from the ways public transport is designed and coordinated to the legibility of Oxfordshire's rights of way. By brokering connections between the cultural and heritage sectors and the creative and tourism sectors, leading cultural organisations and the local authorities, working with Experience Oxfordshire, can play a very progressive role in this field (if additional investment is forthcoming).

The Table below sets out the specific investment proposals made under Priority Theme 1 and links them to the above priority investment opportunities. It also introduces other opportunities which would benefit from additional attention.

Priority Theme 1: Investment Opportunities - Productive and Engaging Experiences

Priority Investment Opportunities:-

1A. A collaborative innovation programme

1B. Festival of Festivals

1C. The most innovative and accessible creative and culture-led place-making and destination-management in the UK

Brief Summary of Investment Proposals Submitted which contribute to the priority investment opportunities and / or operate as standalone propositions.	Additional Opportunities for Further Consideration.
Developing the role of Experience Oxfordshire will be key to the success of this Investment Plan - to become the leading broker, coordinator and a **'Destination Management Organisation Plus'**. This is also key to maximising the opportunities presented through the Governments five-point plan for tourism, the recently announced Discover England fund as well as levering private sector investments and cross sector collaborations. Experience Oxfordshire's overarching **organisation development proposal (019)** seeks to achieve this supported by their **Digital Destination proposal (026)** – see below. In addition, Experience Oxfordshire's proposal to **develop and better promote Oxfordshire's Conference and Meeting facilities and services (025)** (e.g. through trade visits), and linking to a programme of cultural events and activities, has cross over with many of the proposals received that together will help to drive the economy. **(020)** Their **World Class Visitor Welcome** develops service skills of tourism partners and additional capacity through a consultant to advice on 'way finding' packages and services.	**A festival partnership group** set up for all the main festivals, with a terms of reference to include: • Coordinating communication and programming • Shared skills agendas • Innovation and new business and delivery models • Commissioning funds – for local talent development. This would shape the focus of a Festivals programme, with associated festival development fund.

Coordinating the CCHT promotional and destination offer. A number of investment proposals focused on this, some with a focus on connecting **existing assets and creating itineraries.** This Investment Plan can be used as a terms of reference for coordinating these proposals in the future – e.g. led by a stronger Experience Oxfordshire. For example, the proposal from **Cotswolds Conservation Board, Chilterns Conservation Board, and North Wessex Downs AONB Partnership** to develop day visits and short breaks on trails in the three AONB. This provides connections to the SEEIP as the AONB proposal is also an environmental investment proposal. The proposal from **Canal and Rivers Trust (013)** for a series of circular walks linked to the Oxford Canal towpath and working with businesses to make it easier for non-car visitors to access rural tourism and overnight accommodation, could also become one of Experience Oxfordshire's itineraries.

Improved Platforms and Interfaces that link CCHT sectors. A number of proposals focused on this type of activity, presenting synergies to be developed in the future. **Experience Oxfordshire's Digital Destination proposal (026)** aims to provide an enhanced digital platform and strategy for promoting the city and county and connecting with visitors (and locals) pre, during and post visits in multiple digitally engaging ways. **Town, Gown and County: The Oxfordshire Experience (010)** aims to create a new permanent exhibition/visitor attraction in the city that celebrates Oxfordshire using both conventional and innovative display techniques promoting the county beyond from within the city. This is a private sector led initiative which, with some further development work, could become part of a new **Visitor Interface for the county**. It might also benefit from being connected to City Council's ambition for a **New Viewing Experience (017)**[57].

Integrated CCHT promotion across the transport network (including buses, trains and parking providers) – a shared prospectus jointly promoted and accessible to visitors and locals as the Oxfordshire CCHT map.

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57. Both the new Viewing Experience and The Oxfordshire Experience are in the early stages of development with the former not yet fully costed. They are both new attractions whilst also promoting the city and county.

Supporting the existing cultural, heritage and tourism offer through expanding existing events and / or promoting them in new ways. This links to the above cluster of proposals focusing on itineraries and connects to the overarching **Festival of Festivals** proposal. There are multiple opportunities here. For example, **expanding Artweeks** to shops and other town centre venues to increase footfall to businesses and broaden the reach of event to new audiences **(006)**. This could be linked to the **Virtual Art Gallery app proposed by the Thames Path National Trails (033). The Oxford Preservation Trust proposes to expand Oxford Open Doors across the county**, bringing a new audience to hidden heritage gems through annually themed Open Door events **(011)**. There are two proposals for promoting the city and county and its food related businesses and groups through a food guide – from Good Food Oxford **(018)** - and a food map – Barracks Lane Community Garden **(021)**.

Aggregating and amplifying – toward a 'festival of festivals'. The **MCS Arts Festival Oxford (032)** plans to expand the reach and engagement of their event through a more digitally enabled approach and via new outreach and education projects. This could be connected as part of a county-wide approach to festival development and audience engagement. **Oxford University Museums Partnership's proposal (005)** to celebrate a great city of culture and learning through a programme of cultural experiences such as an Oxford Festival of Ideas, could play a very positive role in connecting culture, heritage, tourism and contemporary creative practice – majoring on Oxford's role as a centre for innovation. Other projects show similar appetite for invention – where different sectors are connected and a more dynamic and interactive visitor offer is developed. For example, Hidden Oxford – the museum without walls, and a Contemporary Art and Science exhibition programme; and **Oxford City Councils Low-carbon festival (007)** – which proposes to explore environmental issues and sustainability through creative and cultural activities and to position environmental concerns as central to the 'cultural offer and identity' of the city. There are also opportunities to connect this proposal to **Eco Bicester – sustainable tourism (014)** linking the city and county.

Attractions and interventions to generate new interest and attract new visitors. A number of investment proposals focused on new activities and infrastructure – to add value and diversify the existing offer. This includes **Oxford Archaeology's The Past People of Oxfordshire (023)** which proposes to develop a major archaeological excavation project into a publicly accessible database of archaeological burials across Oxfordshire. Plus a proposal for **Sustainable Tourism in Bicester (014)** – to tell the story of Eco Bicester through a 'Bicester Discovery Centre' and broader promotion linked to local sustainable accommodation and tours.

6.1.2 Priority Theme 2: Skills, talent development and business growth.

Oxfordshire has some of the most experienced and highly skilled creative and digital practitioners nationally and globally – from computer science to publishing – with so much potential to connect this knowledge and skills base across the 'virtuous circle' of Oxfordshire's creative, cultural, heritage and tourism sectors. The Creative Industries is increasingly a small and micro business sector. 85% of creative businesses are micro businesses (up to 10 employees), a further 12% are small businesses (up to 50 employees), and 43% of workers within the creative and cultural industries are self-employed and self-employment in the sector is growing – especially in rural areas. This means growth and competitiveness are delivered through increased productivity by the many rather than the few, and that the spillover effects of a dynamic creative and cultural sector to other knowledge-intensive industries can be significant.

In Oxfordshire, the opportunity exists to be a pathfinder for creative-led growth, where networks of micro and SME creative businesses are more and better connected, clustered and thus accessible to market opportunities across the economy.

Priority investment opportunities for this theme are as follows:

2A. Oxfordshire Creates - the most connected creative and knowledge hub and network in the UK. This could be led by a new knowledge transfer and R&D programme for culture, heritage and education – opening up the universities even further. Oxfordshire already has one of the most connected and networked education to industry partnership in the UK. Both universities are already playing a leadership role here via multiple knowledge exchange and R&D activities. But with world class institutions come world beating aspirations, so in Oxfordshire we can do even more to establish a more open, collaborative, co-created culture, research ecosystem. This could be driven by a coordinated creative and cultural skills platform and network – to ease recruitment, encourage industry / education partnership, and broker links between employers and talent.

Future activities could be much more applied to the specific cultural and creative geography of the county – e.g. focused on rural mobility; on digital R&D for the heritage sector; on accessibility; on design solutions for the tourism sector; on

improving the festivals offer; and on positioning the local creative industries as a testbed for innovation and the development of new business models.

Digital Oxford has an important role to play here – with scope for extending its reach across the county and brokering B2B and knowledge exchange activities between digital businesses and those in the cultural, heritage and tourism sectors.

2B. Creative workspace and activity space integrated across developments as a priority economic use.

Oxfordshire already has a number of workspace and innovation hubs. Opportunities exist to more effectively connect them and to broker cross-sector exchange activities. In addition, with major infrastructure and housing growth to come, **the need for (and different types of) workspace will increase and the opportunity to integrate workspace in new developments presents a significant opportunity** – e.g. to develop rural hubs and to bridge gaps in the existing offer. Further research is required here – to market test and undertake feasibility for a range of workspace options across the county. Opportunities exist to connect Digital Oxford across a portfolio of hubs in the city and county – one of their aims is for physical hub(s). The aim should be to develop local hubs and to develop new types of offer (e.g. co-working and events space) to attract and retain mobile creative talent. Additional opportunities exist to integrate dedicated creative workspace into housing-led developments in the county, to explore meanwhile space (e.g. old retail and industrial space), and to introduce creative workspace within heritage contexts where there is often under-used space.

2C. Dedicated business support and investment readiness for creative and cultural businesses

To include brokered advice on market opportunities, skills/recruitment, and work to nurture business angels' networks with a creative appetite. This is to **build the confidence, capacity and embed innovation.** A further priority is to **mobilise and incentivise collaborative R&D activities** – e.g. pitching creative, cultural, heritage, technology, and food and tourism businesses together to develop new business models that can be genuinely disruptive in the overall CCHT marketplace. This can draw on learning from the national Digital R&D Fund for the arts and the Accelerator Programme which succeeds it[58] – embedding R&D as a core strength in Oxfordshire – building on a legacy of innovation and knowledge leadership.

While no specific proposals were received under this theme there is broad consensus at a national level that this type of support is required. The need for a dedicated Oxfordshire programme and more effective links to national programmes was suggested by a number of the people in the consultations for the Investment Plan.

The Table below sets out the specific investment proposals made under Priority Theme 2 and links them to the above priority investment opportunities. It also introduces other opportunities which would benefit from additional attention.

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58.   http://artsdigitalrnd.org.uk/

Priority Theme 2: Skills, talent development and business growth

Priority Investment Opportunities: A pathfinder for creative-led growth:

2A. The most connected creative and knowledge hub and network in the UK

2B. Creative workspace and activity space integrated across developments as a priority economic use

2C. Dedicated business support and investment readiness for creative and cultural businesses

Brief Summary of Investment Proposals Submitted which contribute to the priority investment opportunities and / or operate as standalone propositions.	Additional Opportunities for Further Consideration.
There were less investment proposals for this Priority Theme. In part this is because commercial creative businesses are less inclined to participate in a strategic investment process such as this Investment Plan. Most creative businesses are very small and their capacity to engage correspondingly limited. This makes it even more important for networks, hubs and platforms to be developed which ensure they are connected to the strategic investment process and do have opportunities to add value across the cultural, heritage and tourism sectors. Proposals relevant to this Theme include: **The University of Oxford Kellogg College Historic Towns & Villages Forum (022)** and **TORCH's Living Lab (024)** both propose developing a research base to engage audiences and develop audience-facing skills in the heritage and cultural sectors. TORCH as a knowledge transfer hub has the opportunity to focus on collaborative research to enhance visitor experience, increase visitor numbers and develop skills within the heritage sector. **Oxford International Centre for Publishing Studies Oxford Brookes University (003)** have proposed to collaborate through a skills and talent programme for the publishing sector. This focuses on developing and connecting the tried and tested Oxfordshire Publishing Group's affordable training programmes which up-skill new and existing staff in publishing companies, and support increased child literacy rates and employability through work with schools.	**Dedicated creative and digital hub** as a visible and accessible centre for workspace, research, collaborative practice and knowledge exchange. This would be in central Oxford. It would be the meeting point for creative businesses and the centre for cross-sector commissions and R&D. It would also provide the physical co-working space for the wider digital Oxford network. Other town centre and rural hubs should also be prioritised – as micro versions of the above – establishing a network model for the county. Libraries could be adapted to form part of this offer. **A CCHT R&D commission / fund** which brokers connections between CCHT businesses, working to accelerate digital development across these sectors and enhance the innovation capacity of businesses and organisations – from technology SMEs to heritage organisations.

Brief Summary of Investment Proposals Submitted which contribute to the priority investment opportunities and / or operate as standalone propositions.	Additional Opportunities for Further Consideration.
Film Oxford - Developing young people's creative and cultural skills (009): a proposal for a rolling foundation programme in digital arts for 16 – 25 year olds not in employment education or training living in Oxfordshire. This could be connected in future strategic partnership activities to the proposal by **MCS Arts Festival Oxford Hub (031)** for coordinating cultural education and participation work with schools and young people linked to the county cultural education hub. This presents an opportunity for a more joined-up approach to culture-led education which in turn can help nurture a young county-wide talent pool to benefit from targeted skills and business support activities further into their careers.	**Creative and cultural skills programme** – including a coordinated apprenticeships and internship offer to businesses; and a skills fund for building technical and management skills across the CCHT sector. This could be delivered in partnership with Skillset and Creative and Cultural Skills; the universities; a selected further education partner e.g. Abingdon and Whitney College; Digital Oxford and Experience Oxfordshire. **Oxford Cultural Leaders – emerging leaders strand (OCL)** – building on the success of this international leadership programme for senior cultural leaders from Oxford University Museums and the Said Business School, this proposal will explore rolling out a residential programme which offers experiential leadership development opportunities for early-mid career cultural sector leaders.

6.1.3 Priority Theme 3 – Creative Place-making

As this Investment Plan has made clear, **creativity, culture and heritage shape and transform places**. They give them their distinctive identity, energy and feel; they offer communities personality and voice; and they attract visitors and investment. These sectors also open up the life chances of people, enhancing wellbeing, improving cohesion and adding to the quality of the environment.

Building from this Investment Plan, **Oxfordshire can become a pioneer for creative, culture, heritage and tourism-led growth**. This can involve core tools such as a more targeted cultural planning approach that introduces new cultural infrastructure, improves existing infrastructure, and embeds high quality public art and design as a core part of any development. This is to ensure new communities have access to cultural opportunities and that distinctiveness and quality are key considerations for any development but it is also to ensure our towns and villages are more attractive to new jobs and new investment.

Strategic opportunities for Oxfordshire include:

3A. Creative and Cultural commissioning as core to place-making and community development. A strategic mechanism for cultural commissioning that includes high quality public art in public realm improvements; a dedicated investment programme for contemporary art in key strategic sites across the County; and a new programme of arts and health and creative education commissions that embed culture in social and wellbeing agendas and help bridge the gap in opportunity across the county. This is already being shaped as a development opportunity. With 47 public artworks already in place or planned as part of the new and forthcoming developments and the public art policy that the Oxfordshire districts have signed up to, the county is already making great strides in this area. Oxford Brookes University is leading the way in this area negotiating a per cent for art deal of 1.5% of the estates development budget for the new John Henry Brookes building, that was available for newly commissioned public art and included work of current students.

Housing-led growth provides a major leverage opportunity here, with significant scope for a coordinated approach to commissioning creative and cultural practice for public art works as well as providing dedicated employment space for these sectors. This is to ensure that housing-led growth has quality and distinctiveness with opportunities for incoming and existing populations to have an enriching and active role in their local communities. It is also to ensure quality and distinctiveness – such as through the creative use of public space, commissioning of public art and leisure amenities. This can involve the consolidation and diversification of existing cultural infrastructure (e.g. in town centres), the reanimation of the heritage offer, and support for festivals and events which can enhance the quality of Oxfordshire's towns and villages.

3B. Creative and cultural infrastructure is introduced to the heart of major developments. This includes those already planned – such as Westgate in Oxford city centre or Banbury Canalside (see below). Such large-scale mixed-use developments would be improved if they integrate cultural infrastructure and in so doing open up opportunities for creative activity and for a more diverse visitor economy. This includes reconceptualising the role of libraries – as knowledge and creative hubs (inclusive of workspace) catalysing exchange and mobilising innovation and growth; and it includes opening up heritage assets such as through museum collections and temporary exhibitions to ensure commercial developments also deliver cultural and social value.

The Table below sets out the specific investment proposals made under Priority Theme 3 and links them to the above priority investment opportunities. It also introduces other opportunities which would benefit from additional attention.

Learning about dinosaurs at Woodstock Museum – Oxfordshire County Council

Priority Theme 3 – Creative Place-making

Priority Investment Opportunities - Oxfordshire can become a pioneer for creative, culture, heritage and tourism-led growth:

3A. Creative and Cultural commissioning as core to place-making and community development.

3B. Creative and cultural infrastructure introduced to the heart of major developments

Brief Summary of Investment Proposals Submitted which contribute to the priority investment opportunities and / or operate as standalone propositions.	Additional Opportunities for Further Consideration.
Several investment proposals focused on improving existing infrastructure and / or on the role of cultural and heritage organisations in enhancing the quality of place. This included: • A proposal by the **Oxford's Broad Street Trust (004)** for improving the **East End of Broad Street** to create a world-class public space responding to the recently refurbished New Bodleian (Weston) Library. • A proposal from **Cherwell District Council** for the Bicester Market Square regeneration **(016)**. This will create a new public space, enhancing the setting of the historic buildings in and surrounding the existing Market Square they will be programmed with cultural activity for existing and new residents and visitors. • **The Canal & River Trust** have submitted a proposal for upgrading 6.3 km of the Oxford Canal's towpath the OxCan cycle path (012). This will create rural 'greenway' and enable access to Oxfordshire's countryside and benefit residents and tourists. Vital to these schemes is a creative and cultural dimension – high quality art and design, opportunities for events and programming and an attention to the needs of visitors and residents alike. Several proposals were submitted with a focus on **improving, expanding and / or diversifying the cultural infrastructure offer.** This is a key priority agenda if we are to enable our excellent creative, culture and heritage organisations to develop and grow, establish new sources of revenue, and deliver greater added value to the economy.	**A coordinated approach to public realm and access improvements** across central Oxford – including: • commissioning of contemporary art at key gateway points • the development of interactive mapping (in signage, via Apps etc.) • connecting park and ride passengers to the CCHT offer via information on programming. • consistent use of high quality materials in heritage environments. **A creative and cultural commission** set up to coordinate investment allied to housing-led growth. This is to focus on community infrastructure, public realm improvements and growing the festival and events sector. **Town centre culture and heritage plans commissioned** – focusing on the active development of CCHT sectors. This can commence with Abingdon – linked to the BID, with other priority places Banbury, Bicester and Didcot.

Brief Summary of Investment Proposals Submitted which contribute to the priority investment opportunities and / or operate as standalone propositions.	Additional Opportunities for Further Consideration.
• A case in point is the proposal by **The Story Museum - Chapter 2 (029)**. This is an ambitious and much needed capital development plan to give greater space and capacity for learning activities, generate new programming opportunities and enable the museum to move towards greater self-sustainability and resilience as a key part of the city centre cultural offer. • A proposal was submitted for a major redesign and refurbishment programme at **Modern Art Oxford (015)** - to enable it to operate much more efficiently and through the new design significantly improve the visitor experience. This can be connected to the proposals for the Story Museum – establishing a compelling fabric of cultural infrastructure to the heart of Oxford. • An equally compelling proposal was submitted by **Banbury Museum (030)** for the redesign and expansion of their retail, exhibition and activity spaces to improve sustainability through the diversification of the cultural offer. This is as part of a wider scheme for Banbury town centre development – showing how creative and cultural activities can add value and connect to a set of regeneration, inward investment and of course visitor economy agendas. • Oxfordshire County Council's proposal for a feasibility study to explore options for a **redesigned business model for a museum service for Oxfordshire (035)**. A new partnership-driven model will make the extensive collections of the historical and archaeological collections more accessible to a wider community and more easily able to respond to and drive change. In turn, this will enhance the sustainability of the service.	A creative and cultural focus for the Castle quarter in Oxford – with scope to introduce a contemporary outside performance space, some flexible gallery space, and independent creative and cultural retail.

6.1.4 Priority Theme 4 (Cross-cutting Theme) - Cross-sector working and collaboration

One of the key attributes of the creative, cultural and heritage sectors is the way businesses and organisations here are significant value-adders to the wider economy – e.g. to tourism – with spillover effects on talent attraction/retention and inward investment. In addition, there is growing acknowledgement and understanding of the ways businesses and organisations in this sector can play a major role in the innovation of other sectors – e.g. through spillover effects to advanced manufacturing, technology and science sectors. To maximise the value of the creative, cultural and heritage sectors requires a strongly networked, open and collaborative ecosystem.

Innovation is increasingly driven by factors such as creativity, design and the convergence of different activities and platforms. Vital here are ecologies of collaborative and mutually inter-dependent businesses. Geoffrey Crossick, Warwick Commission Commissioner and Director of the AHRC Cultural Value Project, goes so far as to say that:

"Without a vibrant artistic and cultural sector at all levels there would be no successful creative economy. The vibrancy of the cultural world as a whole suffuses all kinds of activities with the imagination that makes the country's commercial creative economy full of ideas, innovation and success".

Oxfordshire has so much potential here – it has the universities, the cultural organisations, creative businesses, heritage landscape and tourism offer. With an even more purposeful approach to collaboration (such as through dedicated research and development activities with the micro business creative industries sector; or via open innovation programmes), Oxfordshire could establish a more dynamic, radical and energetic cultural offer; its creative industries could grow faster and drive competitiveness across the economy; and the tourism offer would be more diverse, contemporary and higher value.

There are different ways of delivering this - as suggested above. This includes cross-sector network activities; targeted research and commissions which link different types of business from a range of sectors; and impact hubs where complementary businesses and organisations work together to tackle a social or environmental challenge. The European Union provides some opportunities here via partnership programmes such as **Interreg Europe**[59] and cross-sector international collaborations and R&D projects are encouraged through its **Creative Europe**[60] programme. In the UK, **Arts Council England** is encouraging cultural and creative organisations to collaborate – with one another and with the technology sector – e.g. via its partnership with **Innovate UK** for culture and heritage organisations[61].

Investment proposals submitted involved some collaborative activities, particularly those submitted for **Priority Themes 1 and 2** (see the tables above). The opportunity next is to broker collaborations between organisations which submitted complementary or similar proposals, with this Plan operating as a terms of reference. This will require a strategic focus in order to lead development.

59.   Interreg Europe (2016) http://www.interregeurope.eu/
60.   European Commission (2016) Creative Europe, Supporting Europe's Cultural and Creative Sectors http://ec.europa.eu/programmes/creative-europe/
61.   Arts Council England (2016) Arts and Technology Pilot Programme http://www.artscouncil.org.uk/funding/apply-funding/funding-programmes/arts-and-technology-pilot-programme/

7

7.0 Economic Benefit

Creative, cultural, heritage and tourism investment has the potential to make a valuable contribution to economic growth and development in Oxfordshire. If taken forwards, the ideas and investment proposals set out in the Investment Plan will play a role in the delivery of all four of the priorities of the Oxfordshire Strategic Economic Plan (SEP); People, Place, Enterprise and Connectivity.

As shown in **Section 6**, the investment proposals outlined in the Investment Plan will contribute to the SEP priorities in a number of ways:

People: Engaging creative talent to provide high quality and sustainable employment in the CCHT sectors; improving skills and capacity across the CCHT sectors; and inspiring audiences to participate in cultural experiences; and attracting tourists to actively engage with and spend money on the fantastic creative, cultural and heritage offer of Oxfordshire.

Place: Embracing the distinctive urban and rural areas of Oxfordshire as places to visit, work in and live in. With the sensitive and imaginative use of cultural and heritage organisations and sites, and through the application of creative and digital approaches, we can improve places across the County and enable them to marry high growth with high quality.

Enterprise: Building a strong and productive creative industries sector which is high growth and innovative; and delivering spillover effects across the economy to enhance growth and competitiveness across all sectors.

Connectivity: Facilitating effective networks across the county – of businesses, organisations and customers. Enabled by high band width and excellent transport links, CCHT sectors can thrive through connectivity.

While quantification of the specific impacts of the Investment Plan on the Oxfordshire economy is not feasible without detailed economic modelling that is beyond the scope of this study, the qualitative case for creative, cultural, heritage and tourism investment in order to support the economy is strong.

Some of the investment proposals outlined in this plan would directly generate expenditure and jobs. In particular, ambitious investment in the visitor economy has been estimated to have the potential to generate an increase tourism spend of £3.5 billion by 2030, thus doubling the value of the visitor economy through a 40% increase in inbound tourism and extending visitor overnight stays. This would create a further **10,000 jobs subject to funding**.

The proposals in the Investment Plan could make a small contribution to this, alongside a range of other investments in the creative and digital economy and low carbon economy linked to but outside the scope of this plan. Some investments

> The visitor economy has the potential to reach £3.5B by 2030, creating 10,000 new jobs.

would also create business opportunities in other sectors through the spillover effects they generate – as demonstrated by the recent research by Arts Council England which analysed 100 different cultural and creative projects across Europe to explore the different types of spillover effects generated through public investment. These include direct outcomes in regeneration and inward investment, plus outcomes that enhanced the growth potential and innovation capacity of the creative industries[62].

A new "Cultural Citizens Programme" will be set up by the Arts Council England and Heritage Lottery Fund. Larger cultural organisations will be expected to take on apprenticeships to promote diversity and inclusion in the workforce. (DCMS Culture White Paper, 2016)

It is clear that a coordinated approach to investing in the CCHT sectors across Oxfordshire would deliver these types of spillover effects and would directly contribute to growth and competitiveness. For example, some investments would create or strengthen demand for cultural, heritage and tourism goods and services. Others would create more jobs, such as project officer roles or jobs constructing proposed infrastructure.

Eynsham Hall grounds and gardens – Eynsham Hall

In most cases however, direct expenditure and employment are not the primary reason for undertaking creative, cultural, heritage and tourism investment. More important is how they would contribute to sustaining and supporting activity across the wider economy in Oxfordshire. This could arise in three main ways:

- **Workforce mobility, efficiency and productivity:** proposals that provide benefits to health and wellbeing relating to improvements in environmental quality and opportunities for outdoor leisure and recreation. Plus proposals which enable a productive workforce of micro creative businesses in rural areas and small towns.

- **Skills:** a number of the projects focus on raising awareness and developing skills for members of the public and/or parts of the workforce. Some are focused directly on skills which will enable people to access employment, improve the way that their business is managed, or pursue new opportunities. There is a further opportunity for coordinating the skills offer – e.g. apprenticeships and internships developed in partnership with the creative industries to increase access to the sector from harder to reach communities. Plus opportunities to enhance knowledge exchange and technology transfer activities between the education and CCHT sectors.

The quality of the environment and outdoor recreation and leisure link directly with health and wellbeing.

- **Avoided costs:** contributing toward a healthier and more productive population and making a clear contribution to talent retention – so that the best CCHT talent remains and prospers in Oxfordshire.

Each of these factors would be expected to support a small, direct increase in GVA per capita in Oxfordshire. The £44.5m of creative, cultural, heritage and tourism investment proposed as part of the Investment Plan is just a fraction of Oxfordshire's annual GVA of £15.5bn, and the £billions of other types of investment which are envisaged in the county over the period covered by the Strategic Economic Plan. A number of the investment proposals are first stage investments for project development or seed funding to lever additional larger scale investments and project expansion in the future.

62.   Creative and cultural spillovers in Europe, 2015. Arts Council England, Arts Council Ireland, ecce, Creative England and European Cultural Foundation.

Riverside at Wallingford – Experience Oxfordshire

A further significant aspect of the economic case for creative, cultural, heritage and tourism investment is its role making it a more attractive setting for business and development. Valuation of this impact includes consideration of certain factors such as collaborative networks, hubs and workspace, and festivals. These factors can play an indirect role in attracting and retaining investment from businesses of all sizes to the county. The cultural and heritage offer is known to be a factor in the investment decisions of larger businesses, affecting where they choose to locate and the value of commercial properties[63]. One of the main reasons that the quality of the cultural and heritage offer is a key factor in choice of location for business is because it helps them to attract and retain a good quality workforce.

The quality of the environment is known to be an influence on house prices, reflecting how increased environmental quality raises demand for housing. A specific and growing part of this workforce is self-employed home-workers, which are an important part of the rural economy, as they often have some flexibility in choosing a location to live and work and it's known that a large number of this workforce belongs to the creative industries. Transport links (e.g. to London, which are good for Oxfordshire) and broadband connectivity is usually vital to their location decisions. However, the quality of the local cultural offer and links to creative businesses with whom they can trade and exchange, are also important factors.

Finally, the same environmental quality factors that attract business and workers to locate in particular communities in Oxfordshire will also attract people from outside those communities to visit for leisure purposes. This creates economic opportunities for businesses offering services to visitors (e.g. catering, accommodation, recreational activities). Providing communities with a higher quality creative, cultural and heritage offer can therefore make a large contribution to Oxfordshire being a more attractive location to live, work and visit.

Assessment of the impact of the proposed investments must allow for the possibility that they fund things that would have happened anyway, or that they displace other likely investments. However, overall the investments proposed in the Plan are considered to have additionality, given that the CCHT infrastructure in Oxfordshire is under-leveraged and has so much potential.

> The cultural and heritage offer plays an important part in attracting a highly skilled workforce and new business across the economy.

> Broadband is expected to cover 97% of Oxfordshire by 2017.

Burford – Experience Oxfordshire

63.   One seminal publication is Richard Florida's 'The Rise of the Creative Class' (2002). This argues that places with a strong and diverse cultural offer, a high quality of place, and an openness to different cultures and ways of life, are more attractive to a highly skilled mobile workforce.

8

Glass Tank Prototype process, production 2014 – Oxford Brookes University

8. Delivery Strategy

While a significant amount of work has been undertaken across the CCHT sectors in Oxfordshire to prepare the Investment Plan and the ideas and investment proposals within it, this is just the start of the process. Further work will be undertaken to drive progress on each of our investment priorities. This will include working up the investment proposals in further detail, implementing them, rolling out successful proposals to additional locations where applicable, and identifying and responding to new challenges and opportunities as they emerge.

While much of this work will be done by organisations across the sectors in Oxfordshire working individually or in partnerships, there will continue to be a need for leadership, governance, coordination, financing and other activity at the strategic level. This overarching strategy for delivering the Investment Plan is described below.

Banbury Cross – Experience Oxfordshire

8.1. Leadership and governance

Leadership of the Investment Plan will be the responsibility of OxLEP. **A Sub-Group of the LEP Board** will be established, with responsibility for steering the delivery of the Plan, reviewing progress, and strategic decision-making. Detailed terms of reference for the Sub-Group are to be agreed by its members, however our initial proposal is that it will:

• Meet on a regular basis, for example quarterly

• Have a membership made up of representatives from across the creative, cultural, heritage and tourism sectors in Oxfordshire and members with a role in economic strategy and development planning, including appropriate people from public and private sector organisations, education, research and local government.

- Initial appointment of members will be by application to OxLEP

- The Chair and Vice-Chair will be elected by the members.

8.2 Cross-sector engagement, coordination and capacity building

OxLEP will set up a sub-group of the LEP Board to help identify potential funding, co-ordinate partners and drive through projects to meet strategic priorities.

The success of the Investment Plan lies in the actions of organisations across Oxfordshire and their future interactions. Stakeholders for the Investment Plan include any organisation operating within Oxfordshire with an interest in and ability to deliver against one or more of the strategic priorities. Their continued involvement and willingness to work together to achieve shared goals will be essential if we are to achieve the efficiencies, economic impacts and outcomes set out in this plan and realise our vision.

To facilitate this, OxLEP will work with its partners and their networks, including the local authorities and in particular Experience Oxfordshire, to continue a process of regular engagement with the wider stakeholder group. In addition to tracking and coordinating activity across the sectors, this engagement will continue to build capacity amongst stakeholder organisations to make stronger connections between creative, cultural, heritage and tourism investment and economic outcomes, innovate, secure funding and deliver their projects. It will include issuing news and progress updates, organising occasional networking events or workshops, and establishing communications channels whereby stakeholders can provide updates or ask questions.

8.3 Reinforcing the strategic framework and evidence base

To facilitate an efficient, joined up approach to creative, cultural, heritage and tourism investment, it will be important to have an effective strategic framework that guides action across the county and access to a shared evidence base to inform the work of different stakeholders. While OxLEP is responsible for the Strategic Economic Plan, the SEEIP, CCHTIP and other county-wide strategies, Oxfordshire County Council, Oxford City Council and the four District Councils have responsibilities in this area. These include setting and implementing planning policy and the Local Transport Plan, undertaking evidence base studies, and holding other useful data including geographical information.

As part of the delivery of the Investment Plan, OxLEP will work with Experience Oxfordshire and the local authorities to reinforce the strategic framework and evidence base for future creative, cultural, heritage and tourism investment, and share this information more effectively with the relevant organisations. This will include the leadership, governance and engagement processes which the Investment Plan is establishing to inform future updates of the Strategic Economic Plan, other county-wide strategies and future work by Experience Oxfordshire and the local authorities. It will also include reviewing and where appropriate updating the Investment Plan in the future to tie in with other strategies, policies and emerging challenges and opportunities to ensure it remains relevant, current and useful.

The GREAT Britain Programme launched in 2011 to support the 2012 Olympic Games will continue… and Governments new Events Industry Board will help support major events (DCMS, Culture White Paper, March 2016)

8.4 Financing

Although pressure on public sector spending persists, there are a variety of options available for financing the creative, cultural, heritage and tourism Investment Plan. These include:

- Government spending by relevant departments and their agencies. The investment proposals set out in the Investment Plan are of relevance to a wide range of departments, including the Department for Culture, Media and Sport, the Department for Business Innovation and Skills, the Department for Communities and Local Government, the Department of Health, the Department for Education, the Department for Environment, Food and Rural Affairs, and the Department for Energy and Climate Change.

- Major infrastructure and development projects, which invest directly in creative, cultural, heritage and tourism infrastructure including parks, open spaces, walking and cycling connections and habitat creation to complement their scheme or meet other planning or regulatory requirements. The Oxford Flood Alleviation Scheme is one example of a major opportunity to deliver other forms of tourism infrastructure along its route.

- Local authority budgets cover a range of creative, cultural, heritage and tourism investment, for example the management and maintenance of some parks, open spaces and other public sector land holdings, and support for walking, cycling and other sustainable transport measures. In some cases, upfront investment will lead to long term savings in local authority budgets or additional revenue streams for local authorities.

- EU funding is available for projects which meet given criteria. These include the LEADER programme for rural development and the European Structural Investment Fund (ESIF). Often there is a research, demonstration and dissemination component to EU projects. Some funds are awarded by direct application to the EU, others are distributed on a regional and local basis by relevant agencies including OxLEP. Opportunities for dedicated funding are available through Creative Europe and a range of network-based projects.

- Charities and other bodies continue to support creative, cultural, heritage and tourism projects through direct investment or grants with major sources including the Heritage Lottery Fund and the Big Lottery Fund, Esmee Fairburn and Paul Hamlyn funds.

- Development and investment bodies with a focus on creative, cultural, heritage and tourism sectors – including Arts Council England, Creative England, British Film Institute, Arts and Humanities Research Council and Nesta.

- Equity or debt finance, either from the private sector, public sector or individuals, may be available for creative, cultural, heritage and tourism investments which are able to deliver a direct financial return. The ability to secure such finance and the conditions and costs attached, will depend on the level of risk, the expected scale of the return and the duration over which that return would be realised.

- Philanthropy – working closely with the universities, which have an excellent track record in attracting philanthropic investment, and with the heritage sector which is a key target for much philanthropic investment.

- Crowd funding or other community investment models, whereby a large number of individuals from the local community contribute financially to projects, either by donation, lending money or buying shares. Oxfordshire is already home to the Low Carbon Hub, based in Oxfordshire, which is a pioneering organisation that promotes community investment in renewable energy. This model could be used by rural communities wishing to promote their location as a tourist destination.

The DCMS Culture White Paper published in 2016 encourages organisations to explore different ways of fundraising including philanthropy.

The appropriate approach to financing will depend on the nature of each investment proposal. In particular, it will depend on whether the proposed investment will generate direct revenues or financial savings, who these benefits accrue to, whether and how they can be capitalised on, and whether they represent an attractive return on that investment. For investments where there is a sufficient cash return on the proposed investment within an acceptable timescale, the preferred approach may be to secure equity or debt finance. For other investments where the benefits justify the cost, but these benefits are dispersed, realised over the long-term or otherwise difficult to capture in cash terms, alternative arrangements might be more appropriate.

As highlighted above, the total cost of all Investment Plan proposals (capital and revenue costs combined), would be around £44 million. Most of the proposals identify at least one potential source of finance, which the proposing organisations will take responsibility for securing directly from the source. However, the sources of finance identified are in most cases only partial, they are not yet confirmed, and many projects will require additional match funding from another source before they are able to go ahead.

A crucial consideration for OxLEP is the feasibility of establishing a central creative, cultural, heritage and tourism investment fund that can be used as match funding to kick start projects, lever in additional investment to Oxfordshire and unlock the potential benefits set out in the Investment Plan. This fund would be established from a combination of the above sources, and then topped up over time using a portion of the proceeds from the growth and development which has been enabled as a result of creative, cultural, heritage and tourism investment, for example CIL or rising business rates. The establishment of a starting fund is recommended to catalyse the activity set out in this investment plan, in addition to providing an incentive for further investment to come forwards in future.

Funding would be allocated to projects by application, determined by the OxLEP Sub-Group, on the basis of their ability to contribute to the Investment Plan and SEP priorities and the scale of projected impact on economic growth and development. The criteria for funding will be used to drive innovation, efficiency, value for money, multiple benefits, collaboration and partnership working. Where appropriate, some of the investment proposals set out in this plan will be incorporated into other LEP strategies which relate to specific government funding sources, such as the Skills Strategy.

A number of issues will require consideration in the establishment of such an investment fund. These include ensuring that it does not compromise or compete with the fundraising activities of individual stakeholders but supports them. Some funding sources may require ring-fencing, have different criteria for how they are allocated

and administered, and require transparency in accounting, auditing and monitoring of results which could affect the ability of the LEP to pool funding sources. There are also restrictions on the eligibility of match funding sources. These issues will need to be considered by OxLEP Sub- Group in the establishment and administration of the fund.

8.5 Monitoring and review

Monitoring and reviewing progress will be an essential role of the CCHT sub group in ensuring the long-term success of the Investment Plan. It is recommended that a number of key performance indicators are measured to facilitate this, including both output and outcome measures, for example:

- Output measures could include amount of funding secured, number of investment proposals funded, progress with implementing specific interventions such as amount of infrastructure completed, advice or training courses delivered or digital technologies integrated across the CCHT offer.

- Outcomes could include economic, social and environmental outcomes such as number of jobs created, number of people with improved skills, number of visitors to new or improved visitor destinations.

Eynsham – Experience Oxfordshire

What indicators are measured and how frequently they are reviewed will depend on the availability and reporting cycles agreed for relevant data. Whereas output measures are relatively straightforward to collect, information from the relevant parties, measurement of some of the outcomes of the CCHT investment and establishing a causal link can be challenging, particularly for indirect outcomes. However, monitoring and assessment methods are improving continually particularly with the development of advanced datasets and digital technologies. It is recommended that OxLEP work with stakeholders across Oxfordshire, including Experience Oxfordshire, the local authorities, the Universities and other research centres to agree on an approach to monitoring which makes the best use of the available data and expertise in the county and supports innovation where appropriate.

The Investment Plan is intended to be reviewed and updated on a regular basis, following a cycle that is coordinated with and feeds into the process for the SEP. These reviews will be essential to ensure that it is meeting its objectives and delivering on the vision and strategic priorities, and also to enable new opportunities to be identified and incorporated.

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Appendix 2. Investment Proposals

Summary of Investment Proposals

The following investment proposals have been put forward by stakeholders across Oxfordshire in response to a call for innovative project and programme ideas in August 2015 for the CCHTIP. In considering these proposals it should be recognised that some proportion of the expenditure would be likely to have occurred anyway. However, given the objective to attract investment from sources external to the county, a substantial proportion of the spending would be expected to be additional and contribute to an increase in GVA across the county.

The Investment Plan is the start of a process that will be added to regularly over time so that organisations with ambition can include new ideas. (CCHTIP 001, 002 and 012 have been included in the SEEIP.)

CCHTIP 003

Oxfordshire Publishing Group: The Oxfordshire Publishing Group (OPG) was established in 2013 and provides a networking organization for publishers in the Oxfordshire region. This project proposal for £150k over 2 years will enable Oxford Brookes University to continue to run the OPG through the Oxford International Centre for Publishing Studies.

This enables local publishers the opportunity to come together in an unprecedented way to pursue areas of common interest and concern and to develop a number of new initiatives. Key amongst these has been specifically designed training courses to meet local needs, and to address areas that local publishers have identified as being critical in a fast-changing industry. The courses have been of particular benefit to SMEs and freelancers, who are not usually able to afford the cost of training. This has also allowed publishers to work closely with Oxford City Council and Oxfordshire County Council on a number of important literacy projects in local schools.

CCHTIP 004

Broad Street Trust - Public Realm Improvement: This proposal focuses on improving the East End of Broad Street in Oxford City Centre to create a world class, formal public open space that will frame the buildings that face onto the space with high quality materials that respond to the architecture, respect the geometry of the Sheldonian and ensure that the hard landscaping maintains the spatial relationship linked to the recently refurbished New Bodleian (Weston) Library.

The pedestrianisation of the area will improve the environment and act as a catalyst for wider regeneration within the city centre. Improvements to the streetscape will make the area more vibrant, enhance Oxford's image and brand and showcase

This Investment Plan is the start of a process that will be added to regularly, so that organisations with ambition can include new ideas.
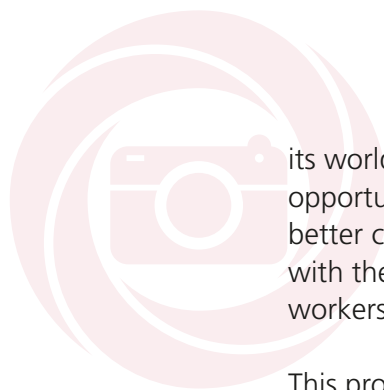
its world-class heritage. This will attract new investment and open up business opportunities that will enhance economic growth, as areas of the West end become better connected. This will enhance the City's visitor economy as tourists stay longer with the potential to spend more, as well as benefiting the many local residents and workers who will value an attractive space and "sense of place".

This proposal is part of a greater Vision for Oxford 2035, that was published by the Oxfordshire County Council-Transport Strategy 2015 to deliver three key objectives:- to build a thriving knowledge-based Economy; to have an enviable quality of life, and to have an attractive and vibrant public realm. This strategic project will cover all aspects of design, commissioning and procurement over a 2 year period and will cost £3m. It will be steered by key partners including The University of Oxford, The Oxford Preservation Trust, Oxford City Council and Oxfordshire County Council.

CCHTIP 005
Oxford University Gardens, Libraries and Museums: celebrating a great city of culture and learning: Oxford University's Museums (Ashmolean Museums, Museum of Natural History, Museum of the History of Science and Pitt Rivers Museum) in partnership with the Bodleian Libraries and the Botanic Gardens (and other cultural partners as appropriate) will develop and deliver a range of innovative and exciting cultural experiences for visitors to the City. Cultural tourism is known to have a positive impact on economic growth and the University Museums already have a proven positive impact on economic growth of around £50m per annum. National and International touring exhibitions promote Oxford and increase footfall, but also attract an overseas market that is a draw on the tourism visitor economy throughout Oxfordshire. Projects will include:

- Oxford Festival of Ideas: Building on Oxford's reputation for innovation and new thinking the festival will showcase the University's collections and staff research, linking in with academic departments and other cultural venues across the City and with potential to go countywide.

- Oxford Treasures: This will celebrate the 400th anniversary of the birth of Elias Ashmole in 2017 by bringing together the University's founding Tradescant Collection. This exhibition will (through content and public programming) tell the story of the development of the great institutions by including other significant treasures. Such an exhibition will also have national and international touring potential.

- The Oxford Cultural Mile: a joint museums / libraries / gardens digital platform and leaflet based on Museum Mile in London. Print and digital versions will signpost visitors across the City to points of interest making an excellent city-wide offer.

- Hidden Oxford – the museum without walls: Using innovative new super connective technologies to uncover hidden Oxford through an app, or web platform compatible with mobile devices, which creates the City as a 'museum without walls'.

- Contemporary Art and Science exhibition programme: A series of exhibitions with potential to tour nationally that draws on the cultural assets and research expertise of the University of Oxford.
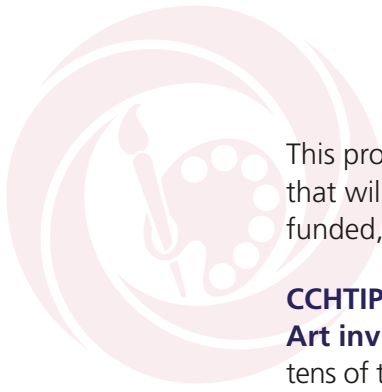
This proposal includes a strategic programme of cultural experiences and activities that will require investment of £500k - £3m depending on the numbers of projects funded, and is expected to run up to 2020.

CCHTIP 006

Art invigorates town centres: During May the Oxfordshire Artweeks Festival sees tens of thousands of visits to around 400 venues spread across the entire county over a three week period. This proposal will encourage town centre businesses to take part in the festival by offering space to creative talent that will help draw in a new footfall demographic and support existing and emerging artists in the community. This Investment Programme delivering small projects across the county is expected to cost between £4k-£25k in revenue expenditure depending on the scale and number of venues used.

The presence of several festival venues in the centre of Oxfordshire's market towns (e.g. Banbury, Bicester, Abingdon, Didcot, Faringdon, Thame, Wallingford, Wantage, Witney, and Woodstock) will draw people to the town centres, supporting all the shops/eateries for the duration of Artweeks. This initiative could deliver 3-5 new art exhibition venues in each of ten market towns resulting in a 'festival feel' that will help boost the local economy.

This proposal will deliver high quality art across the county show-casing the creative talent in Oxfordshire's visual art and design sector, helping professional and emerging artists develop their profile and careers in the arts and also build personal enterprise amongst the artist community. It is estimated that around £1million worth of art is sold by/commissioned from Oxfordshire Artweeks artists, so plays an important role generating income to increase the number of professional artists who are financially viable across the county. In addition local businesses will benefit from the positive publicity and increased visitor numbers to the town centres, and residents will benefit from being inspired by art exhibitions on their doorsteps.

CCHTIP 007

Low Carbon Oxford Week: Low Carbon Oxford Week (LCO) is an innovative city-wide festival which uses culture, creativity and community to inspire people to take action against climate change. It celebrates Oxford as a leading sustainable city and showcases local businesses, communities and other organisations that are contributing to a thriving low carbon economy, putting Oxford on the map as a national centre for low carbon innovation.

This proposal is for expansion of the festival to the wider Oxfordshire economy and promotion at a national level in order to bring wider benefits and increased investment to the area. LCO's delivery model uses funded coordination and marketing resource to deliver core events and activities and provides an excellent opportunity for businesses, arts organisations and academic institutions to promote their 'green' credentials, showcase innovation and to network and collaborate with cross-sector partners on a shared theme. This project costing £150k is a supporting intervention to enable the LCO to expand and become self-sustaining.

LCO Week began in 2014 under an initiative led by Oxford City Council and has already gathered huge momentum in its first two years based in Oxford City, but

now has the impetus to expand across the county to include other key locations such as Harwell campus, North West Bicester Eco Town and other key growth areas of innovation on the Oxon Knowledge Spine. In addition to this there is also the opportunity to link with a number of other high profile events including The Tandem Festival, BBOWT's Festival of Nature, Science Oxford, Oxford Bike Week, Oxfordshire Science Festival and FloFest to deliver a whole month of events in June to create a bigger impact and national interest. This would help provide an innovative tourist offering for the whole of Oxfordshire which will build on the city's brand and grow its 'green' credentials. It will also open up opportunities for local people to better understand and enjoy the benefits of a low carbon economy and healthy and sustainable lifestyle.

CCHTIP 008

Film Office for Oxfordshire: Over the last 5 years filming in Oxford and throughout the county has risen dramatically and brought considerable economic benefits. This has been due to a greater awareness of the benefits of filming in Oxfordshire and a 'film friendly' reputation for the county within the industry which in 2014/15 brought an estimated £2m in indirect spend to the county.

This proposal by Film Oxford and partners for an investment of £150k will lead to the creation of a new Film Office post for 2 years that will enhance, develop and streamline a service in the cultural sector to build a more proactive approach to current services, charges and procedures. It will deal with film enquiries more effectively and give the opportunity to develop a more visible Oxfordshire film heritage for tourism.

This has the potential to bring the City, County, University, Location Oxfordshire and Creative England together in a unique collaboration that proactively promotes the county around the world as a filming location. It will also offer work experience opportunities for local young people studying film with a pathway into the industry as companies come to the region.

CCHTIP 009

Young + Digital + Creative: This proposal submitted by Film Oxford with the potential to include a number of key stakeholders and partners will involve setting up a rolling foundation programme in digital arts costing £120k over 2 years for 16 – 25 year olds not in employment, education or training living in Oxfordshire. The programme will be based at Film Oxford and Fusion Arts in East Oxford, two established arts organisations with a track record of work with young marginalised groups.

Through the programme 60 young people will build key skills in digital arts practice as they work towards live performance events in Oxford including Cowley Road Carnival and Oxford City Christmas Lights Festival. This will offer a vibrant, engaging, relevant and unique training programme in a professional environment with clear outputs and meaningful accreditation that will build confidence, skills and aspirations as well as building a positive digital profile for students to promote themselves for 'next step' opportunities. As part of the 'next step' programme mentors will offer guidance and support over 3 months into further training, apprenticeships and volunteer work including self-employment and small business start-ups.

CCHTIP 010
Project: Town, Gown and County-The Oxfordshire Experience: This proposal will involve creating a new world class gateway visitor attraction in Oxford. The "Oxfordshire Experience" will be the ultimate tourist information and will encourage and motivate visitors and locals to travel and explore the county through a mix of engaging stories and immersive interpretation that will showcase Oxford and the spectacular countryside and, picturesque towns and villages of Oxfordshire.

The experience will attract all ages but will be of particular interest to the 11-16 year olds. Each visit will yield something new and provide an opportunity to contemplate this amazing county using innovative projection displays that are immersive, emotional, and dynamic. The finale of this attraction will be a 3D film that captures the iconic landmarks and stunning visual backdrop of the counties architecture, landscape, rivers, and canals along with the "must see" villages and towns in a fun and memorable way.

Included in the admission price will be a short term license for an Oxfordshire 'app' that can be accessed from any mobile device, which will inform and guide visitors around the county using 'augmented reality' to recreate the past. It will deliver the iconic stories of the county's growth from architecture, industry and commerce to innovative science, in effect acting as a "tour guide" to the many attractions throughout Oxfordshire.

This project run by a group of experienced Local Entrepreneurs, with the support of local business and sponsorship "It's all about A Story" will create a county wide infrastructure for tourists and visitors to explore the county and will represent the fantastic historical and cultural depths of Oxford/Oxfordshire, by delivering an inspirational experience that will fully harness the things that are great about the county-its unique heritage, historical fabric and cultural prowess.

This project is also committed to the development of a learning environment and will develop an apprenticeship scheme covering a number of disciplines and work experience opportunities and as a Strategic Project with an investment Programme to create a new type of visitor attraction in Oxford it will also payback a proportion of its profits to create information stations around Oxfordshire. £150k is being sought initially for detailed design and project planning with a further £3m being raised through a mix of private sector funding for the development and building phase.

CCHTIP 011
Oxfordshire Open Doors: The Oxford Preservation Trust already run a very successful highly regarded annual cultural festival in Oxford which is the largest of its kind in the country, but this proposal would see this event being expanded across the county.

Oxfordshire Open Doors will showcase economic success stories through its local businesses but the geographical location will be county-wide. Annual targeted areas will include a focus on the 'knowledge-spine and 'science vale', areas for growth and housing development at Bicester and Didcot, and market towns. There will also be the opportunity to develop themed routes including science & technology, engineering, the motor sport industry, country houses, the River Thames, sporting heritage, food, and literature/printing.

This proposal is a supporting intervention costing £60k over 3 years but will provide a vehicle to showcase the wider cultural heritage and arts offer across the county, and will share Oxford's tourism success through linked, signposted and curated destinations and routes that will generate interest and increased visits. In turn this will help highlight existing local character and create a sense of place and community for local people.

CCHTIP 013
Promoting the Visitor Economy in Rural Areas (the Oxford Canal Walk): This proposal by the Canal and River Trust will make it easier for non-car visitors to access rural tourism and overnight accommodation in the countryside, and is similar to schemes offered in the Peak District, National Trails and other long distance walks.

The project is aimed at small and medium attractions and settlements and will promote and market non-car routes to these destinations, and working with a local provider will offer to move overnight bags to the next destination. This will enhance the Oxford Canal Trail and give more access to the visitor economy in rural areas and boost local businesses in the hospitality industry. The organisation will also co-ordinate and map a series of circular walks linked to the Oxford Canal towpath which is now over 200years old with a large number of historic buildings and features, plus a wealth of history to discover and work with partners to market.

£100k funding will be needed over an 18 month period to help set up the "bag moving business", and will include funding from Cherwell District Council who has agreed to support the initial feasibility study as a strategic project in the Oxford Canal corridor.

CCHTIP 014
Sustainable Tourism in Bicester: Bicester is a designated Garden Town, in an identified growth area expected to see 10,000 new homes by 2031. As the UK's first eco-town, the first phase of which is an endorsed One Planet Community, one of only ten such sustainability exemplars globally, it has been involved in the delivery of a range of sustainability projects over the past five years.

This proposal by Cherwell District Council will capture the learning and experience of all those involved in the work to date to create an online physical presence to share the 'eco' story and sustainability culture of Bicester. This will open up opportunities in tourism including the creation of a 'discovery centre' and eco-trials that incorporate exemplary new build developments, retrofit and innovative energy. This will attract a new type of tourist to the town and help develop a thriving green economy.

Marketing Bicester in this way will help develop its investment potential as a place to see exemplars of the sustainable built environment and low-carbon lifestyles that will make it an attractive, innovative and exciting place for companies to locate. The project will take 2 years to complete and seeks funding of £200k. £150k capital investment to develop the website, creation of publicity and exhibition material, and £50k in revenue expenditure to engage with local business and provide training.

CCHTIP 015
Modern Art Oxford Refurbishment scheme: Modern Art Oxford lies in the heart of Oxford City centre and attracts in the region of 140,000 visitors to the city annually.

It also promotes the city through online platforms to a UK and international audience of 600,000 providing a public service to modern and contemporary visual culture, adding to the rich intellectual and cultural offer of the city.

This proposal is for a major redesign and refurbishment of Modern Art Oxford costing in total £5.5m. The majority of this funding for £3.5m has already been secured through The Arts Council England; £1.8m will be raised through benefactors and a range of other sources, which leaves a balance of £200k being sought from OxLEP to complete the investment.

The detailed design proposal is now at an advanced stage and has been subject to positive discussions with the City Council planning officers, and if approved will allow Modern Art Oxford to significantly improve the visitor experience and increase visitor numbers in excess of 250,000. This project will greatly improve the tourism and cultural offer in the city and add significantly to the regional and national economy that is estimated to be worth £4.7 billion.

CCHTIP 016
Bicester Market Square Regeneration: This strategic proposal by Cherwell District Council with the support of partners seeks a comprehensive regeneration of the historic Market Square in Bicester to create a public space and tourist attraction, providing and enhancing the setting of the historic buildings and attracting new investment to the South side of the town. It is expected to cost £1.409m and take 2 years to complete.

The new public space and partial pedestrianisation will bring aesthetic improvements and allow cafes and restaurants to use the space in front of their premises for outdoor seating to create a café culture, linking to the visitor facilities in Bicester Village. The renewal of the public space will provide the setting for cultural and heritage assets in the Bicester Conservation Area, increase footfall and support there-emergence of the Market Square as the focus of the town centre with the potential to provide space for events, exhibitions or the expansion of street markets.

CCHTIP 017
New Oxford Viewing Experience - Visitor attraction: This proposal was a concept by Oxford City Council and partners to explore the potential opportunities within the West End area of the City centre to provide a new visitor attraction that would allow those visiting, working and living in Oxford to experience a different view of the City and its surroundings.

The West End of the city is undergoing major new development and could potentially accommodate:

- An "Oxford Eye" similar to the London Eye opposite the Houses of Parliament.
- A Viewing tower that could potentially be an independent structure or viewing gallery incorporated within or on the roof of a new proposed building.
- A Hot-air balloon (tethered) that could be a temporary arrangement

All options would provide breath-taking views of the world-class architecture and heritage of Oxford, but would also act as a catalyst to attract tourism to Oxfordshire. This would add to the vibrancy of the city, enhance its image and help showcase Oxfordshire to a wider audience to increase visitor numbers and grow the tourism economy. At this stage no cost analysis is available.

CCHTIP 018

Building sense of place and interpreting Oxfordshire's unique heritage through food: Food is an integral part of the tourism experience. It forms the main purpose for travel for a small proportion of tourists, but makes a positive contribution to the holiday experience for more than 60% of visitors. Food is key to defining a sense of place for tourism destinations, plays a crucial role in boosting the contribution visitor spend in the local economy and forms a link between urban tourism centres and their rural hinterland. According to the Oxford economic strategy (2013), Oxford's food offer is weak "… [it] is crying out for … eating experiences that differentiate it from similar cities."

This proposal by Good Food Oxford in conjunction with project management delivered by Resource Futures Ltd will develop a Food Guide for tourists, telling the story of Oxfordshire and its hinterland through its food. It will also enable Oxfordshire-based food businesses to develop sustainable strategies to sell their products into tourist-facing food service businesses in the county and develop a B2B guide to help businesses use food to build a sense of place. This project will enable wider economic growth by supporting an increase in local procurement for those involved in the production and marketing of food and could offer opportunities for diversification of rural businesses and better retention of visitor spend throughout Oxfordshire. In addition this could lead to improved skills development for those employed in the industry and development training by Oxford Brookes University and Further Educational Colleges that run food-related courses. The project cost will be £120k over 12 months at which point it would be financially self-sustaining.

CCHTIP 019

Development of Experience Oxfordshire and Delivery of the Emerging CCHTIP: Experience Oxfordshire is the Destination Management Organisation (DMO) for Oxfordshire that promotes leisure, cultural and business tourism to domestic and international markets. However at present only 2.5million visitors stay overnight and there has been a significant decline in overseas visitors over the past decade.

This proposal by Experience Oxfordshire seeks to deliver two key objectives, the first to become a leading, thriving and sustainable Destination Management Organisation (DMO) and the second is to work with OxLEP to deliver the CCHTIP Investment Plan. As an important strategic programme to drive investment and support the wider economy across Oxfordshire this project seeks funding of £3m over 6 years, some of which will come from ESIF, Visit England, UKTI, Local authorities and other sources.

Working with a wide range of public and private sector partners this project will involve developing a new Destination Management Plan (DMP) for Oxford and Oxfordshire that gives clear leadership and guidance to the sector to achieve significant growth to the economy. This will be achieved by linking into the new Government Five Point Plan for tourism that recommends a more co-ordinated approach to grow the sector by working together with local attractions and tourism
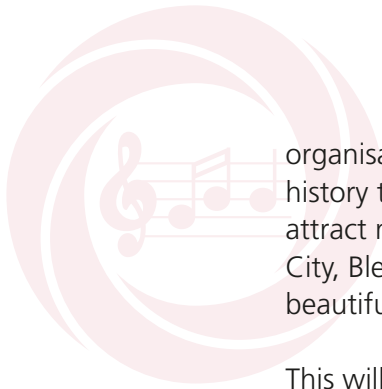
organisations. Oxfordshire has world class heritage and an enviable amount of history to draw upon as well as a diverse contemporary cultural offer, and will aim to attract new visitors by marketing through the globally recognised brands of Oxford City, Blenheim Palace, and Bicester Village and then enticing visitors to explore the beautiful countryside and market towns.

This will be achieved through a range of projects including the launch of a new consumer website in multiple languages, innovative and creative marketing campaigns, improved digital profile, a better visitor welcome, production of key research including the analysis of data and the raising of Oxfordshire's profile with the travel trade through attendance and representation.

Through this highly innovative approach there is the potential to deliver significant economic growth within the sector. Experience Oxfordshire expect to increase tourism spend by 5% year on year up to 2030, that could potentially double the value of the visitor economy by 2030 to reach £ 3.5 billion. This could create 10,000 new jobs in the industry and reposition Oxford in the top 5 of inbound tourism destinations in the UK.

CCHTIP 020
A World Class Visitor Welcome for Oxfordshire: This proposal by Experience Oxfordshire seeks to improve and create a "world class visitor welcome" for the more than 25.5 million visitors who come to the county each year, to ensure that they are offered the best possible experience throughout their journey. This project will take place over 4 years with a planning, implementation and review stage requiring an investment of £250k, but will leave a permanent legacy.

Experience Oxfordshire will work with the hospitality industry (hotels, restaurants, pubs, retail, and attractions) and transport sectors (buses and taxi operators) to develop new training courses that will be specifically geared towards significantly improving the Visitor Welcome. This will be achieved by working with the key higher education providers, such as the City of Oxford College.

The project will significantly improve the visitor experience making it a more attractive and welcoming place to visit but also enhance the world-class reputation of the area. Improving the accessibility to information and data through the use of better way-finding and smart technology will also make it much easier for visitors to navigate the county. This will help to encourage repeat visits and deliver direct economic benefits.

CCHTIP 021
Food Mapping Oxford: This proposal by Barracks Lane Community Garden is a supporting intervention over 2 years costing £45k that seeks to map the history of food production in Oxford and its environs, looking at market gardens, breweries, bakeries, eel-trapping grounds, farms, orchards, allotments and much more as well as supporting businesses such as eel-trap makers, osier growers and horse hospitals.

Volunteer researchers will be given training to conduct interviews, search archives, and map and record information from living memory. This will be used to produce an artist designed map, plus routes and information for guided and self-guided walks in both the City of Oxford and in outlying areas.

The mapping will also reveal the strengths of the local environment for food production in historic and modern contexts. By demonstrating the potential and capacities for food enterprise that exist locally, the information generated will be promote ideas and support discussion of how local food production can be revitalized. The development of a thriving local food business culture will both create employment and opportunities for healthy diets locally, and attract interest to the many food heritage tourism opportunities in the area.

CCHTIP 022
Market Town Failure – Intervention and Cure - using heritage tourism to improve training, skills and job creation in the cultural and creative industries:
This proposal by the University of Oxford, Kellogg College and Historic Towns & Villages Forum (HTVF) will address Market Town Failure through a two phased project that will firstly use research into heritage tourism to increase day, stay and return visits, and secondly strengthen the connection with the cultural and creative retail industries to improve training, skills and job creation by means of a funded SME start up programme.

The HTVF will bring in partner specialists to carry out research and deliver practical training to Town Teams, community, amenity, heritage groups and others in order to help fill the skills gap. As well as delivering practical skills, there will be focus on how to maximise each town's heritage, creative and cultural USP and how to market this to promote the tourism offer.

Phase One will be used to carry out research to identify failing areas and target groups requiring support, and to design training and training materials for use in SME start-ups, including Marketing, Finance, and Product Placement, as well as choosing suitable Partners for Placement and Mentoring.

Phase Two will target existing businesses and tourism concerns and offer training and community/volunteer engagement to improve business promotion, and pair each with mentors in successful areas. At this stage candidates will be assessed for small grants and low-interest loans from a Legacy Fund in order to set up SME start-ups focusing on the Cultural and Creative Industries and heritage tourism. In addition it will identify appropriate areas for community and industry involvement in development of creative and cultural and heritage hubs. A £550k investment will be used over an initial 5 year period with the underlying vision to develop a strategic partnership that can be rolled out to benefit follow on projects.

CCHTIP 023
The Past People of Oxfordshire: To date, many thousands of human skeletons have been archaeologically excavated in Oxfordshire. Such skeletons offer the most tangible, universal link to the past, cutting across culture and language, and reinforce the human experience of Oxfordshire's heritage.

This proposal by Oxford Archaeology, one of Europe's foremost commercial archaeological units, seeks to develop a comprehensive burials database as a powerful tool to review and summarise the current state of knowledge of burial archaeology in

Oxfordshire. This has the potential to make a valuable contribution to heritage tourism and developer-led archaeology.

A collaborative pilot study in 2015 with the University of Oxford, School of Archaeology explored the public's interest in human skeletons through public engagement events and demonstrated that local and visitors' experience of the county's heritage attractions may be greatly enhanced through this area of work to link with the past. This project will take place over 9 months and require funding of £30k to cover further research, public engagement and development of the database.

CCHTIP 024
OCHRE - Oxfordshire's Centre for Heritage, Research and Engagement:
TORCH, The Oxford Research Centre in the Humanities at The University of Oxford has submitted a proposal to act as the innovative link between research excellence in Oxfordshire's universities and the Creative, Cultural, Heritage and Tourism sector.

The lack of capacity to research old histories to create new stories is one major block that prevents the reinterpretation and reanimation of Oxfordshire's incredible cultural assets. Harnessing the world-leading research of Oxfordshire's universities, will provide the capacity and expertise to underpin the development, marketing and selling of new cultural 'products' and refreshed visitor experiences, providing rich, detailed and exciting new stories about Oxfordshire's people and places, and the thematic rationale to link cultural and heritage sites together.

OCHRE will link Oxfordshire's universities' research knowledge offer with creative and cultural business development, and provide routes to market through close collaborative with Experience Oxfordshire by developing both the business and consumer tourism offer with a focus on improving visitor experience and increasing spend-per-head, delivered to a wider audience through effective collaboration with non-university partners across the sector. This project will be rolled out over an initial 5 year period, but could be extended up to 2030 through an investment of £1.53m. This is a strategic project that will benefit the whole county with particular focus on linking rural hinterlands with honeypot sites such as Blenheim Palace and Bicester Village. Funding will flow from various Education and Arts funding sources and if successful will help develop a quality brand to support the visitor economy and wider heritage offer to attract more foreign visits and investment.

CCHTIP 025
Attracting International MICE Businesses: Experience Oxfordshire has submitted a proposal to increase the volume of conferences which take place in Oxfordshire and has launched the 'Meet Oxfordshire Conference Bureau' - the official conference venue-finding service for Oxford and Oxfordshire which assists conference buyers with planning and organising of a meeting, incentive travel, conference or event (MICE) in Oxfordshire.

A dedicated conference website is being updated and re-designed: www. meetoxfordshire.com which will enable potential conference buyers to see the different venues on offer and submit enquires to the conference bureau. The Bureau organises destination 'Meet Oxfordshire' showcases in London and in Oxfordshire

every year which gives the hotel, heritage and College venues a direct route to the buyers and enables them to do business.

With additional investment of £427k over 5 years Meet Oxfordshire could attend more trade fairs both at home and abroad, host more familiarisations visits for key MICE buyers, and do more promotions. It would also like to develop a cultural social programming offer to conference-goers by developing a cultural database of local musicians, dancers, comedians, storytellers, speakers such as authors and great thinkers for venues to access and recommend to conference organisers. Oxford also has a range of experts skilled at running arts interventions at conferences such as leadership, communication and team-building workshops using drama, singing, visual art and story-telling which will further enhance the conference offer.

This project encourages a 'step change' in the approach to working models and product development from the cultural and tourism sectors to ensure that we develop new, creative, inspiring cultural activities, entertainment and programmes that will leave a legacy and make Oxfordshire a world class destination for the MICE market.

CCHTIP 026
Oxfordshire – A Digital Destination: Experience Oxfordshire has submitted a proposal to implement a digital platform for the county. It will improve the information for visitors before and during their stay and provide local people with better and more accessible information on what to see and do in the county. The project plans to develop three new digital applications (Apps), specifically an Oxfordshire Visitor App, Walking Tour App and What's On App.

The Oxfordshire Visitor App will give visitors a county wide overview of what to see and do. Users will be able to browse attractions, events and festivals and plan their journey before they arrive. The App will also show how to travel between the various attractions by private and public transport.

The Walking Tour of Oxfordshire App will enable visitors and locals to explore the city and the surrounding county through the use of a library tour. Each tour will have a GPS map to guide users through the route, with Ibeacon technology utilised to give information at the key points of interest.

The Oxfordshire What's On App will provide visitors and locals with a comprehensive overview of what's on in the county based on interest and location. Together these apps will transform communication using digital technology and build a modern tourism offer fit for the 21st century. The project will require a strategic investment of £500k run over 2 years and will include one full-time digital position. Year 1 will be used for planning and research followed by a launch and on-going promotion in Year 2.

CCHTIP 027
Horrible Histories of Oxfordshire: Experience Oxfordshire has submitted a proposal to work in partnership with The University of Oxford, Lion Television and The University of Oxford Drones Club, to create a 25 minute film providing a historically accurate and enjoyably light hearted film for visitors and residents detailing the history of Oxfordshire. The film 'Story of Oxford and Oxfordshire' will be enhanced by views

from selected heritage sites gathered by drones and will be dubbed into five different languages and played at the Visitor Information Centre in Oxford. This will encourage visitors to disperse and explore the many heritage sites in Oxfordshire and to stay longer. As a strategic project Experience Oxfordshire will also use the film as a central tool to promote the county to stakeholders and partners in the visitor economy.

The film will be coordinated by Experience Oxfordshire, and local writers of sketches for the award-winning 'Horrible Histories' Lion television series who will be commissioned to write the script for the film, working alongside Oxford University historians. The writers will bring their unique and brilliant spin to events in Oxfordshire's history which will have been carefully researched by undergraduates. This project has been designed to benefit a large range of cultural, heritage, tourism and creative industries partners in Oxfordshire and will be self-sustaining after 3 years following an initial investment of £225k. The writing, rehearsals and shooting itself is expected to take 8 months to complete.

CCHTIP 028

Oxfordshire Itineraries: Experience Oxfordshire has submitted a proposal to develop a broad range of exciting itineraries across Oxfordshire to inspire visitors to experience the attractions, activities, history, heritage, and arts and culture on offer. The itineraries project will also link transport, restaurants and festivals and the guides will provide a menu of packaged itineraries that will be brought to market by partner tour operators and travel agents. The itineraries will target the domestic UK travel market and the top 10 overseas nationalities visiting the county and be translated into these languages. Product development will also focus on identifying 3 under developed areas of the county.

Working with partners in the industry and led by Experience Oxfordshire the project will cover 18 months and require a strategic investment of £150k. 20 itineraries will be compiled following research and development to capitalise on Oxfordshire's strengths such as Film Locations, Oxfordshire Detectives & Crime-Writers Tours, Tours about Oxfordshire's Great Minds from Churchill to Lord Nuffield, new themed tours to enhance Country Houses and Gardens, Science and Ingenuity themed itineraries and the Science parks and motor industry will also be considered. In addition other areas to develop with partners will include 'Cycling Tours of Oxford & Oxfordshire', 'Exploration of Rivers and Waterways of Oxfordshire', 'Art-Lovers', 'Book-Lovers' and 'Music-Lovers' tours. The itineraries will also incorporate local businesses linked to the visitor economy and will encourage visitors to stay longer throughout the county.

CCHTIP 029

The Story Museum Chapter 2 - Capital Development: The Story Museum was the first of its kind. Launched a decade ago it nurtures imagination, innovation and collaboration, breaking new ground to bring together heritage and arts learning that has a real social and economic impact.

This proposal by the Story Museum 'Chapter 2' will be the most significant capital phase in the emergence of The Story Museum, bringing the building into full use. Phase 1 is complete and a total investment of £5.98m is now required to finish the project which will be funded through a mix of public and private investment, but even
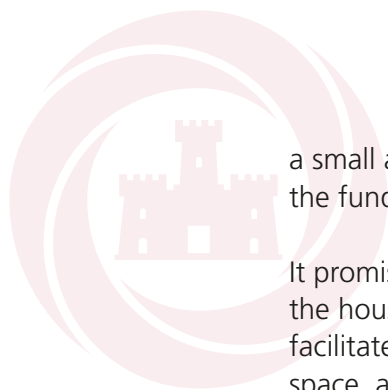
a small amount of support from OxLEP would provide leverage for the remainder of the fundraising.

It promises to transform the visitor experience and range of activities, and will enable the housing of heritage treasures, artistic commissions and permanent displays. It will facilitate the growth of the creative and learning programmes, provide performance space, a learning studio and double the visitor/participant numbers by 2020, allowing it to become financially viable.

Plans include creating a world-class literature centre reconfigured to offer visitors, particularly young families "great ways of engaging with great stories",a new kind of museum including the development of "The City of Stories" multi-media heritage attraction in collaboration with a prominent local digital games company and learning and engagement programmes focused on disadvantaged and excluded communities.

The project which is expected to take 12 months to complete will see the upgrading and expansion of the buildings and a landscaped courtyard area to provide a family-friendly oasis in the city centre; this will ensure the local conservation area retains its historical and cultural spirit alongside the promised commercial vibrancy of the new Westgate Centre. Supported by the Arts Council England and the Heritage Lottery Fund and a number of foundations and donors this project will increase the museum's impact, and improve literacy and life chances across the county.
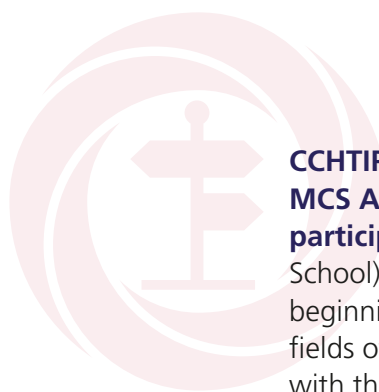
CCHTIP 030
Banbury Museum & Cultural Development for North Oxfordshire and beyond:
Banbury Museum opened in 2002, a flagship museum, funded in part by the Heritage Lottery Fund. It was originally owned and manged by Cherwell District Council but this changed in November 2013 when its governance passed to the Banbury Museum Trust.

The Museum originally opened to address a recognised shortfall in cultural provision in North Oxfordshire and South Northamptonshire and has since attracted 2.5 million visitors. This strategic proposal for £5.7m led by the Banbury Museum Trust is looking to build the resilience and sustainability of the Museum over the next decades through three phases of development recommended by research funded by the Arts Council England.

Stage 1 of the project has been achieved through the redesign of the Museum Shop and Waterways Gallery located on the bridge of the Museum, to improve the interpretation of the Oxford Canal Story. This has made the area lively and suitable for private hire in the evenings, and enabled the development of a New Learning Zone for the delivery of the family programme which has improved the visitor experience and profitability.

Stage 2 will involve creating a larger temporary exhibition space from the existing permanent galleries, to allow for the display of larger national touring exhibitions, and Stage 3 will extend into the loading bay area to create a 150sqm gallery, 100 seater conference area/cinema, with a new entrance onto Spiceball Park Road. The museum will continue to build its links with the commercial sector and its many dedicated volunteers, and continue to work with partnerships to secure the future of the Museum through this project which will take 18 months to complete.

CCHTIP 031

MCS Arts Festival Oxford - Hub for coordinating cultural education and participation work with schools and young people: The (Magdalen College School) MCS Arts Festival Oxford takes place over two weeks at the end of June and beginning of July each year, and comprises a broad programme of events across the fields of music, art, drama and heritage. The Festival is designed to be family friendly, with the Youth Programme featuring events of particular interest to young people, and the outreach work involving many vulnerable groups and deprived communities. In 2015 the Festival included over 100 events in more than 20 city locations, with over 16,000 visitors.

MCS Arts Festival Oxford has submitted a proposal to coordinate a Hub that will aim to facilitate information sharing between organisations in relation to cultural engagement and participation work with young people in Oxford and across Oxfordshire, that will help support collaborative work to ensure that investment across the sectors in coordinated, prioritised and targeted to support areas of greatest need and simplify communications.

This would ensure that resources are used to maximise benefit, for example to engage projects to target a wider range of age groups, to be more geographically focused or to target or develop different skills. This would facilitate discussion between policy makers and cultural organisations to improve performance and organisation, through a coordinated overview that will reduce unnecessary duplication. In addition, it will also help in assess whether the excellent outreach work that already goes on needs further refinement to target known skills gaps, or whether further strategic discussion of the focus of education work needs to take place. This project is expected to cost £15k per annum, but could be extended with the possibility of a contribution from Magdalen College School to facilitate.

CCHTIP 032

MCS Arts Festival Oxford: The MCS Arts Festival Oxford has submitted a proposal to establish the event as a major summer arts festival, attracting visitors from Oxfordshire and further afield to encourage visitors to make more extended stays in the city through participation in an exciting cultural programme at the start of the summer.

The MCS Arts Festival Oxford takes place over two weeks at the end of June and beginning of July each year, and comprises a broad programme of events across the fields of music, art, drama and heritage including speakers and much more. In 2015, the Festival included over 100 events in more than 20 city locations, with over 16,000 visitors, and offers something for everyone including some free events. The Festival is designed to be family friendly, with the Youth Programme featuring events of particular interest to young people.

Total funding of £150k per annum over three years has been sought to invest in the design and implementation of a digital strategy that will help reach a wider Festival audience. In addition this will help build upon the existing outreach work to become a major vehicle for engaging disadvantaged young people and those who have less ready access to cultural opportunities in Oxford, thereby stimulating increased cultural uptake, raising aspirations and supporting the development of skills. At least 2 major outreach, engagement and education projects will be developed that are innovative
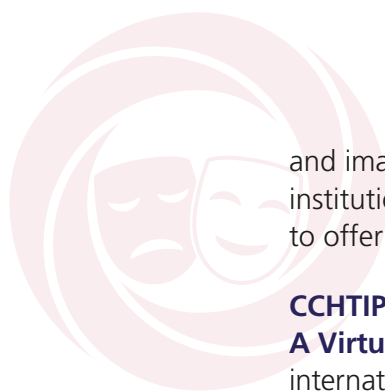
and imaginative in conjunction with the area's cultural institutions, higher education institutions, careers experts, schools and businesses, tailored to young people's needs to offer a full insight into the career possibilities within the economy.

CCHTIP 033

A Virtual Art Gallery along The River Thames: The iconic River Thames and the internationally acclaimed Thames Path National Trail created in 1996 not only play an important role in attracting visitors to the county but also contribute to the 'exceptional quality of life, vibrant economy and the dynamic urban and rural communities of our county.' This project aims to encourage people to engage and gain a greater sense of place though a wider understanding of the area's cultural heritage and current art activity along the River Thames and its wider corridor between Kelmscott to Henley.

This proposal seeks investment of £15k to create a Virtual Art Gallery along the Thames Path National Trail using GPS phone and tablet technology to locate and download images and information in specific locations. The Oxfordshire Thames has provided inspiration for painters and authors throughout the centuries - from William Morris's retreat in Kelmscott, through to Kenneth Graham's Wind in the Willows Thames influence around Henley. The development of a Thames inspirational arts website and app will let walkers discover the authors, poets and artists inspired by the Thames in Oxfordshire and the contemporary, diverse and vibrant artistic movement that the Thames and Oxfordshire continues to inspire.

This fantastic project will raise awareness of the area and benefit local artists and the wider economy as the Thames National Trail celebrates its 20 Year Anniversary. It will also utilise the strengths of Oxford's research and development community to promote health and wellbeing to a wider audience of families and young people.

CCHTIP 034

Oxfordshire Music Education Partnership development of a Website: The Oxfordshire Music Education Partnership (OMEP) is a group of educational and musical companies, services and providers that includes all schools in the county alongside over 30 organisations and a number of educational establishments. It currently engages with over 10,000 children and young people across the county to deliver specialist instrumental and vocal tuition, a wide range of bespoke projects, workshops, ensembles and continuing professional development packages in and out of schools and across the wider community.

The partnership which is led by Oxfordshire County Music Service has submitted a proposal costing £25k to develop an effective and comprehensive website, that will enable the partnership to reach a wider audience of children and young people, and promote and signpost the wide range of musical events and activities available across the county, boosting the profile of the cultural offer in local communities.

It is well documented that those who take part in musical activities benefit hugely through their participation, and increases in academic attainment have also been measured alongside improvements to confidence, discipline and concentration but to name a few. Once started the project is expected to take 6 months to complete, but will help increase enterprise and business development across the music sector.
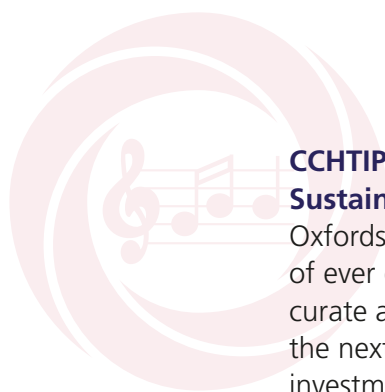
CCHTIP 035

Sustainable delivery model for Museum Services in Oxfordshire: As the Oxfordshire Museums Service achieves its 50th Anniversary, and against a background of ever decreasing funding streams it is now essential to consider how best to curate and enable people to engage with the county's heritage and collections for the next half century. Led by Oxfordshire County Council this proposal requires an investment of £95k to develop a new business model over 12-18 months based around partnerships and wider accessibility, more able to respond to changes and opportunities. This is seen as vital to the future survival of a museum service in Oxfordshire.

Over the last 50 years the context within which the Museums Service was established has changed considerably: the growth of independent museums, the extraordinary impact of the Heritage Lottery Fund, the size and make-up of the county's population, ease and availability of personal transport, leisure activities, communications, education, employment and much more have changed beyond recognition. A life that was once intrinsically connected to a rural landscape has now changed to become a commuting suburb with pockets of deprivation and growing isolation amongst an ageing population.

Oxfordshire's historical collections evidence not only this previous era, but, with its archaeological collections, a much earlier time too and provide a 'grand narrative' of Oxfordshire's past. This project will fund the development phase to establish how best to provide access to the collections to tell the stories of the county, and connect communities with their past. This may include integrating the wider County collection into plans to redevelop the Museum of Oxford, and will explore the growing variety of digital options available to provide access to individuals and for research purposes.

Appendix 3: Summary of Oxfordshire's Creative Industries by Sub-sector

	Summary profile	Key networks and development	Examples of Key companies
Publishing	Oxfordshire is the UK's largest centre of publishing outside London. It is estimated to have over 100 publishing businesses, providing over 3,500 jobs. Publishing companies range from large long established businesses to smaller independent firms. The historic publishing sector has embraced the opportunities technology has provided. Oxford University Press (OUP), a department of the University of Oxford, is the largest university press in the world and the second-oldest (founded in 1586). The historic publishing sector has been an innovator in digital publishing methods. 70% of OUP's revenue comes from electronic material. It has 6,000 employees worldwide, 1,800 are based in Oxford.	– Oxford International Centre for Publishing Studies at Oxford Brookes University is one of the leading institutes for publishing education in the world, with a reputation for innovation and excellence in teaching and research. – OPuS, the Oxfordshire Publishing Society has over 2,000 members with regular events and speakers covering all aspects of publishing. It also organises an annual "Author and Publisher" event. – Oxford Publishing and Digital Media (OPDM) brings together expertise from the Oxford International Centre for Publishing Studies and the Digital Media and Technology Group at Oxford Brookes University. – Book Machine is a publishing community founded in 2010. Since its launch it has partnered with global publishing companies to run events and post news, views and interviews. – Writers in Oxford is a forum for published writers to meet, discuss and exchange of ideas and information. – Publishing companies are also part of other networks across the creative and digital sector.	– In addition to Oxford University Press, other publishing companies in Oxfordshire include Elsevier, Taylor & Francis, global education publisher Pearson Education with its range of digital products and Wiley-Blackwell, scientific, technical, medical, and scholarly publishers. – A large number of independent publishing organisations are also based in Oxford, including How to Books, Infinite Ideas, Osprey Publishing, Oxfam Publishing, and the Voltaire Foundation. – Publishing Technology plc provides content solutions, delivery software and services. This global company is headquartered in Oxfordshire.
Digital media, cyber security and big data	Oxfordshire has world leading digital media companies and a multiplicity of digital networks brought together by Digital Oxford which launched in January 2015 with an event attended by over 500 people. As a network of networks, the key goals are to influence, inspire, promote and connect companies and individuals to support, collaboration and innovation. In the field of cyber security, as well as nationally recognised cyber security academic research capability, there are a number of leading companies including Sophos, Nominet, RHEA and CQR Consulting. Oxford Brookes University - Department of Computing and Communication Technologies is first in the UK to offer a Software Development for Business degree approved by e-skills, the Sector Skills Council for Business and Information Technology.	– Oxford Digital Economy Collaboration (ODEC) Group. The group assists businesses, public sector organisations, innovators and research groups working in the digital, internet, and creative industries, to foster collaborations across the UK. – Oxford Hackspace for the hacking needs of the diverse, creative and talented maker community. They have a studio at OVADA that is currently equipped with numerous tools, Wi-Fi, soldering irons, 3d printer, sewing machine, oscilloscope, game consoles, a thriving community, and much more. – Oxford Geek Night is a regular meet-up for designers & developers run by Torchbox. They have two keynote talks of 15 minutes each followed by a handful of 5 minute micro-slots. – Oxford Start-ups focuses on software start-ups and is held via Meetup.com. – UX Oxford has monthly talks on User Experience in Oxford and consistently brings great speakers since 2011. – Venturefest Oxford does an annual networking event for high tech businesses taking place at the Saïd Business School. – The Oxford Internet Professionals is a monthly meeting to network mingle with other like-minded people from the Oxford area who are involved with the internet, whether they're designers, developers, search specialists, social media experts or digital business owners.	– Sophos is a major developer and vendor of computer security software and hardware. A global company headquartered in Abingdon, Oxfordshire, operating for over 30 years. Its products secure the networks used by 100 million people in 150 countries, used by 100,000 businesses. – Oxfordshire based Nominet is the third largest domain name registry (.uk, .wales etc.). – RM Education specialises in providing IT products and services to educational organisations and establishments. – White October, a web and mobile software development company designing and building digital products. – One Ltd, a design and communications agency. – Digital Remit assisting brands to increase their digital presence and – Syndicut an award winning brand, digital and social agency.

Gaming	Oxford is one of 12 UK Gaming Hubs (Nesta 2014 A Map of the UK's Games Industry). It is identified as being a 'consolidated' sector with a smaller number of companies employing large numbers of people than some of the other hubs and with a stronger presence in console gaming. Oxford's games production sector is thriving with globally leading companies such as NaturalMotion, a University of Oxford spin-out, recently acquired by Zynga for US$527m. There is also a strong supply chains for the industry. This includes Audiomotion Studios, Europe's leading performance capture service provider, specialising in the provision of motion capture services to the Game Development, Film and Television industries.	– The Oxford Technology & Media Network's over 400 members are directors of media technology companies across the county. The network aims to stimulate dialogue to help local startups and businesses find the people, connections and resources they need to flourish. There is also support for new gaming talent such as through CoderDojo Oxford, a free weekly youth club for children age 7 to 17 where they can learn to code and, importantly, have fun. It is held in the Oxford University Mathematical Institute and sponsored by NaturalMotion Games. – Gaming companies are key players in many of the digital networks outlined above and below.	Leading games companies include: – Rebellion whose hit games include Sniper Elite, Aliens vs. Predator, Rogue Trooper, and Star Wars Battlefront: Renegade Squadron. They also have a comic and publishing arm. – Red Redemption, producers of two global warming games: Climate Challenge and Fate of the World. – Lightning Fish Games, a video game developer specialising in family-oriented titles for Sony PlayStation 3, Microsoft Xbox 360, Nintendo Wii, Microsoft Windows and smart phones. – Redberry delivering creative technology to some of the world's best known brands including Universal Pictures, Warner Bros, Marriott Hotels and McDonalds. – Other companies include Exient Ltd, Ragtag Developments Ltd, Glitch Games Ltd, First and Touch Games Ltd.
Film, TV and Broadcasting	Oxfordshire is a popular film and TV location, instantly identifiable across the world from films such as Harry Potter and the Golden Compass and TV series Morse and Downton Abbey. It is also home to numerous production and film technology supply companies and freelance production talent. The county's industry is well-served by production facilities such as Audiomotion Studios and post-production houses such as The Hall, whose facilities rival those in the UK's post-production centre in London's Soho.	– Oxford Technology & Media Network – film and TV is one of the key sectors represented within this network. – Film Oxford is a regional training Hub for Film and Digital Media. It supports a number of networks and user groups including an Adobe User Group called Digital Film Editors and Oxford Digital Creatives providing the venue and advertising their meetings. Sound Technology and Digital Music is a leading degree course of its kind at Oxford Brookes University. – Abingdon and Witney College – students are involved in daily live broadcast of That's Oxford TV channel.	Leading companies include: – Vicon, developer of motion capture products not just for Entertainment but Life-Sciences and Engineering industries. Their motion capture cameras were used on the Oscar winning film, Gravity. – Novel Entertainment specialists in the creation of children's characters, are the producers of Horrid Henry and the Fimbles. – Sports and entertainment specialists include Indigo Jingo Ltd and Juice Moving Images. – Smaller specialist companies include Angel Sharp Media, Oxford Digital Media and Landmark Films.
Design	The design capabilities of Oxfordshire are intrinsically linked to the digital media as well as the craft and individual artist/makers sub sectors within the county. Over half of the 804 software companies identified in the Tech Nation report are focused on design and development. Design is a key feature of many of the high-tech industries such as the motor industry and there is growing design into wearable technologies in the county. Ideas and creations of small-scale designers feed the larger design and production companies.	– Oculab at the University of Oxford has Oxford Smart Specs Project developing 'smart glasses' for visually impaired people. They are associated with the University of Oxford department of clinical neuroscience. – The Faculty of Technology, Design and Environment at Oxford Brookes University has an international reputation for innovation.	Leading companies in Design include: – Thinkable founded in 2006 has won numerous design awards and holds over 60 design and utility patents. Thinkable's Motorola Solutions HC1 was featured in the Hong Kong magazine BranDfocusing on the latest wearable technologies. – Waveoptics developers of wearables for augmented reality applications in the logistics, automotive, healthcare industries.

Music		
– Oxford has produced some of the country's top bands, including Radiohead, Supergrass, Ride and Foals. The county has world-leading choirs, as well as music producers, engineers, and technologists. – The county is home to some of the major music festivals in the country – including Wilderness, Cornbury, Hay, Towersbey, Woodstock and Henley. – Oxford Contemporary Music, aims to engage diverse local and national audiences to deepen understanding and appreciation of musical cultures from within the UK and worldwide.	– Oxford Music Network – the UK's largest network of professional musical organisations – is working collaboratively to make a full contribution to the cultural development of the county. – Oxfordshire Music Service, one of the largest and most active music services in the country. – The Oxford University Music Society was founded in 1872, making it one of Oxford's oldest and most prestigious societies. It was founded to promote the appreciation and performance of music within the University. – University of Oxford Music Faculty is internationally renowned and one of the largest in the UK. There are numerous orchestras and choirs, an extensive events programme as well as a research and knowledge exchange programmes. – The School of Audio Engineering (SAE) deliver creative media courses and their global HQ is in Oxford.	– Solid State Logic are the world's leading manufacturer of analogue and digital audio consoles and provider of creative tools for film, audio, video and broadcast professionals. – We7, pioneers of online music were bought by Tesco for £10.8m and renamed Blinkbox Music. – Oxford Digital is an established centre of excellence in audio processing, with particular expertise being in audio processor and programming environment design.

Visual arts and crafts		
– Oxfordshire is home to hundreds of artists and crafts people. The scale and scope of this subsector is demonstrated through Artweeks which each year showcases and generates sales and profile for the artists and crafts people exhibiting in over 400 venues in Oxford. University of Oxford's annual Ruskin Degree Show attracts over 1,000 visitors with Oxford Brookes' Art Foundation show also an important event in the visual arts calendar. – The Old Fire Station workspace is one of the limited workspaces for artists and makers outside their homes. – Artists are working with organisation such as Fusion Arts, OYAP and OVADA, on programmes and initiatives to develop the skills of young people, arts in health and art in the public realm – there are currently 45 public art projects underway across the county. The local authorities Arts Partnership is working with OCVA on their exploration of co-commissioning and social impact bonds.	– Craft Network, a collaborative initiative between the O3 Gallery, in the Oxford Castle Quarter, city centre haberdashers Darn it & Stitch and the Pitt Rivers Museum's VERVE project, holds talks and events. – OxOnArts, is an online resource and community for artists, makers, practitioners, arts organisations and communities. – Arts and Health Network – a co-ordinator has been appointed to facilitate this network to support collaboration and share thinking and learning. – The Oxfordshire Craft Guild is the focus for quality craftsmanship in Oxfordshire. Membership is open to makers of proven ability in a wide range of crafts. – Fusion Arts is a catalyst for creativity in Oxford, and beyond. Since 1977 we have connected artists with communities, and inspired hundreds of bespoke creative projects. – Oxford Art Society was founded in 1972 and the majority of the Society's members have professional art training and many combine their lives as working artists with teaching or other art related professions. – The Oxford Creative Assembly is a free monthly meet-up with talks and workshops around the common theme of creativity.	– Modern Art Oxford – is a leading UK contemporary art space hosting an innovative programme of exhibitions, talks, music and screenings. – Oxfordshire Artweeks – annual open studios and exhibition event in May, managed and run by and for its artist and gallery members. – OYAP – giving young people, particularly those disadvantaged and vulnerable, the opportunity to learn and develop confidence and skills through irresistible creative projects. – OVADA is an artist-led organisation, hosting exhibitions and events and providing learning opportunities from their city centre venue and other off-site locations. – Arts at the Old Fire Station is a charity and social enterprise in the heart of Oxford, offering performances, exhibitions and support for emerging artists.

Performing arts

Oxford and Oxfordshire has some excellent performing arts venues offering a diverse range and scale of work. From New Oxford Theatre, operated by ATG group, through Oxford Playhouse, Pegasus Theatre and The Old Fire Station to The Mill in Banbury, Chipping Norton Theatre and Unicorn in Abingdon.

Oxford School of Drama – rated in the top 5 drama schools in the world, Pegasus Theatre and Oxford Playhouse artist and resident, youth theatre Playmaker new writing programmes, are all supporting the development of emerging theatre talent in the county.

Oxford Brookes University Drama course has a leading reputation and The Oxford Research Centre in the Humanities (TORCH) is opening up the university spaces to music and theatre groups and leading on cutting research and engagement programmes in arts, culture and heritage.

– The Oxfordshire Drama Network brings together and informs the work of over Oxfordshire's 50 or drama and operatic groups which bring thousands of residents together to develop and express their creative talent each year.

– Pegasus Theatre runs over 30 projects a week involving young people and adults in skills development and creativity through performance.

– Dancin' Oxford establishes Oxford as a recognised hub for vibrant dance activity. It provides opportunity for participants to actively engage in high quality dance, through an exciting programme of participatory activity and performance.

– Dance Scholarship Oxford (DANSOX) promotes dialogue between research and the worlds of dance theory and practice, bringing top names in the world of dance and movement to public audiences throughout the city.

Other talent development programmes include:

– Oxford Playhouse - Evolve: Artists in Residence scheme, Playhouse Playmaker and youth theatre. These development programmes are run alongside their received and in-house productions.

University of Oxford and its many constituent colleges attract an extraordinary range of leading playwrights, directors, actors to give talks, sit on panels/ and take part in Q&A sessions. Ralph Fiennes, Vanessa Redgrave, Michael Billington, Tom Stoppard, Kevin Spacey, Ariane Mnouchkine, Simon Russell Beale, Stephen Sondheim and many others have come to Oxford as guests.Some have been part of the Humanitas program (the Visiting Professor of Theatre) and others have been Cameron Mackintosh Visiting Professors of Contemporary Theatre at St Catherine's College.

Two of University of Oxford's other performing arts programmes are:

– Arts and Humanities Research Council Cultural Engagement project the "Connecting Oxfordshire Theatres" (funded between Feb.-Sept. 2016)

– The Community Grants scheme: small grants to support local arts and heritage groups with projects.

– Cornerstone is a purpose-built, professional arts, culture and entertainment venue in the heart of Didcot that presents a high quality programme of live performance, participatory activities, exhibitions and outreach work.

– The New Theatre Oxford is the main commercial theatre in Oxford with a capacity of 1,800 people.

– The North Wall Arts Centre, a 200-seat theatre and gallery/bar space, with an emphasis on new and innovative work.

– The Mill Arts Centre programmes a diverse range of live performances in its 200 seat theatre.

– The Theatre Chipping Norton is an arthouse cinema, a gallery and a concert hall.

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Our Priorities

people

Deliver and attract specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive employment and fulfilling jobs.

place

Provide the quality environment and choice of homes needed to support growth and capitalise upon the exceptional quality of life, vibrant economy and the dynamic urban and rural communities of our county.

enterprise

Encourage innovation led growth, underpinned by Oxfordshire's strengths in University research and development, business collaboration and supply chain potential.

connectivity

Allow people to move freely, connect easily and provide the services, environment and facilities needed by a dynamic, growing and dispersed economy.

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