

Improving Evening Cultural Offer Review – Scoping Report

Purpose of Report

1. This report presents information in support of a proposed night time economy related scrutiny review, and asks members to agree a suitable review remit.

Background

2. In early June 2013 this committee received a number of introductory briefings on possible scrutiny topics for this municipal year. This included a briefing report on “improving the quality of the heritage and arts offer in the city provided by the Head of Culture, Tourism and City Centre. It suggested the proposed topic would support the Council’s aim to continue working with its partners to ensure the city attracts more cultural tourists by supporting improvements in the quality of the heritage and arts offer in the city.
3. The committee were informed that given the Council’s budget restrictions any improvements to the heritage and arts offer in the city would have to be delivered in partnership with other creative and cultural organisations across the city. They also learnt that the Council was already working actively with its partners to flesh out a new high level tourism strategy for the city, which included the creation of a cultural tourism programme. And, that an application for the necessary funding for the programme was in the process of being drawn up for submission to Visit England/Arts Council England in July 2013.
4. The committee therefore agreed to postpone their consideration of the suggested scrutiny topic until the second half of the municipal year when the outcome of the funding application would be known.
5. Subsequently, at a meeting of the Corporate and Scrutiny Management Committee (CSMC) on 24 June 2013, members agreed a corporate scrutiny theme for this municipal year around the city’s night-time

economy, noting its connection to a number of the Council's current key priorities in its Council Plan 2011-2015.

6. CSMC agreed it would be possible for each overview & scrutiny committee to identify an appropriate night time economy related topic which would support their individual terms of reference. They tasked each committee with completing its night time economy review in time for the presentation of their review final report to the meeting of CSMC in March 2014. In turn, CSMC agreed they would collate the findings and recommendations arising from each review and present them to Cabinet by the end of the municipal year.
7. In July 2013 this Committee agreed the proposed topic on improving the quality of the heritage and arts offer in the city would be appropriate as their contribution to the night time economy themed corporate review. They agreed to focus the review on improving the evening cultural offer in an effort to encourage more visitors to stay over night in the city. Introductory information in support of that review is detailed below.

Tourism in York

8. York was one of the first inland English cities to embrace tourism as a response to the decline of its traditional industries. From the outset it saw its assets as being the built heritage of the city. In 1968 York became a Conservation Area, recognising the value of the built environment to its visitor economy. In 2007 York was awarded the title of European Tourism City of the Year by European Cities Marketing and it has repeatedly won awards as a favoured destination for visitors. Although the focus has remained on heritage, the city has consistently sought to introduce innovative ways for the tourist to engage, for example through an emphasis on live steam at the National Railway Museum and presenting the history of Viking York through the revolutionary ride at the Jorvik Centre. Despite its compactness York is ranked 6th amongst English towns and cities for all trip purposes by domestic visitors, ahead of much larger business centres such as Leeds, Liverpool and Newcastle and well ahead of other heritage towns and cities (Visit England 2011).
9. Trends in tourism in York have been tracked through an Annual Visitor Survey since 1995. The latest summary (2011/12) shows that York has a relatively high proportion of repeat visitors (78%) and a wide range of age groups. York appears to have particularly strong appeal to family parties (37%) and about one in four visitor parties included children (27%). The largest proportion of visitors to York is visiting from within

Yorkshire (24%) but there are significant numbers from the North West (10%), East Midlands (6%) and North East (6%). York has a strong appeal for international visitors at 17%, which is higher than the Yorkshire average (12%). Key overseas markets include the USA, Australia, China, Ireland, Canada, Germany, the Netherlands, France, Norway and Spain.

10. While progress has been made over the past two decades, so that tourism is now a highly significant element of York's economy at about 14% of gross value added (GVA) and 21% of employment, some indicators suggest that income from tourism may have reached its zenith and that it could decline while numbers continue to increase, becoming less sustainable and valuable to visitor and resident alike. International comparative research demonstrates that the development of a visitor economy which exhibits the same sort of structure as York will eventually slow down, and this point could well have been reached in the past few years.
11. Therefore it is the view of Visit York that to realise its ambitions, the city must now choose whether to carry on doing more of the same, which will mean competing for a declining share of the market, or innovating and making better use of its principal assets.
12. To get the tourism offer right York must tackle three challenges: what the city has to offer, the manner in which it is offered and the support provided by its transport, communication and accommodation infrastructure.
13. External perceptions also need to be addressed. By comparison with other cities, York could make itself more welcoming, both by improving communication with visitors, and by encouraging more engagement with the city's residents and employees.
14. Most significantly, visitors report that York does less than it could to show off its strengths in the cultural and creative sector. Despite the national coverage of successful events like the Hockney exhibition at York Art Gallery in 2011, or the York 2012 Mystery Plays, this does not persist in the media or carry over into wider perception of what the city is about. While visitors are pleased to discover the energy in cultural and creative organisations this is currently poorly integrated into the welcome afforded to visitors, especially if they are in the city for the first time.

15. Definition of Cultural Tourists

Cultural tourists are often described as falling into one of three groups - 'casual, accidental, or purposive'. The York Annual Visitor Survey suggests that 17% can be described as purposive cultural tourists who come to York specifically because of its cultural offer.

16. Beyond the 17% who specifically mention cultural activities there are many more in the casual and accidental categories who, given some practical interventions, would not only engage with culture on their current visit, they would become regular, loyal visitors to York, expecting to experience outstanding contemporary culture in unique, historic surroundings. They may start out as leisure or business visitors, and be in York for a celebration or a conference, but their casual encounter may prompt a future visit with a cultural experience in mind.

17. There has been an upward trend in average length of stay to about three nights but this needs supporting by a more diverse and better connected range of activities of higher quality once the major attractions close for the day. The plan is to arrive at a 'sweet spot' where a greater proportion of high-spending international and domestic visitors stay for three nights or more to take in a mix of contemporary culture and heritage based activities as well as the perennial favourite of strolling the streets of the city and, of course, eating and drinking well.

18. York Consortium

A Consortium evolved from the city's cultural partnership forum, York @ Large has come together to address the issues detailed above. The Consortium is made up of the following members:

- Visit York
- York Museums Trust
- English Heritage Yorkshire and the Humber
- National Railway Museum
- York Minster
- The National Centre for Early Music
- Screen Yorkshire
- Aesthetica Magazine
- One & Other Magazine
- University of York
- Science City York
- Pilot Theatre York
- The Rowntree Society
- Riding Lights Theatre Co.
- York @ Large
- York Archaeological Trust
- York St John University
- National Trust Yorkshire
- York Civic Trust
- York Theatre Royal
- City of York Council

19. The sole focus of the Consortium is the successful delivery of its 'Refresh York' project. A smaller group of members will act as an executive group (or Secretariat) at least for the duration of the project. These are York Theatre Royal, Visit York, York @ Large, City of York Council and a Creative Producer (employed by York Theatre Royal). The Secretariat will meet monthly and the Consortium four times each year. Consortium members have agreed to commit both their administrative and creative resources to realising the project. Each member is responsible for reviewing their activities as part of the project and reporting back to the Consortium through the Creative Producer, whose role is to manage Refresh York as a whole.
20. In July 2013, the Consortium submitted an application for Visit England/Arts Council funding for their 'Refresh York' project, in the amount of £331,500. If the application proves successful (result should be known by November 2013) the project will run from March 2014 to February 2017.
21. As part of its project the York Consortium intends to widely promote York Red Letter Nights as a cultural package and will use them to embed improved communication within and across the sector. The programme will consist of thirty commissioned events taking place at regular intervals around the year. The Creative Producer's primary responsibility will be to work with Consortium members to devise, manage and deliver the programme.
22. The criteria for each commissioned event will support the overall programme aims, which are to:
 - rebalance 'heritage York' to include 'creative York'
 - improve the coordination and coherence of York's 'cultural offer'
 - offer 'family friendly' activity in the right time and the right place
 - show off the 'hidden potential' of contemporary culture
 - be 'welcoming' for visitors.
23. Impact on other sectors
The programme arises from a conviction built up over a long process of discussion and consultation that, if leadership ambition and deftness in approach is shown, the external perception of York will shift.
24. But it is not just about cultural organisations taking the lead. The evidence from discussions, and from other initiatives in the USA and elsewhere, gives confidence that when the programme takes place,

retailers will swiftly respond by arranging for later closing times and hoteliers will take the increased number of family stays into account when remodelling their accommodation. Through Visit York these sectors will be kept fully informed and involved at all times.

25. Transport is also a factor that continues to be mentioned as a challenge for York. Experience during the Mystery Plays demonstrates that the city's Park and Ride service is prepared to change to allow for later departures from the city after evening events. Conversations about these and other infrastructure changes with public sector and commercial partners will be made easier because we will be planning further ahead and sharing our objectives to grow the visitor economy.
26. As the three year programme unfolds the Consortium will change as new members join and older ones retire. The process of partnership development will improve collaboration between current members, while a 'studio-workshop' strand run in conjunction with a Higher Education partner will enable what is learnt to be passed on to others.
27. York's New Tourism Strategy
An Interim Document produced in partnership between the Council and Visit York in summer 2013 sets out the principal themes arising from a broad consultation process (see Annex A). The overall aim is to double the value of tourism to York over the next ten years, representing £1bn of economic activity and a further 2000 jobs. This proposal represents a major element of this re-visioning of York as a visitor destination, capitalising on the authenticity, originality and vibrancy to be found in the city's contemporary cultural sector.
28. In addition City of York Council has been working with partners to devise a new mechanism for the delivery of tourism services, support for the arts and cultural sector, and for creative industries development, across the city, which gained Cabinet support on 6 November 2013. This will enable much closer cooperation between the sectors since support for businesses will be under one roof. This new entity is expected to be established in 2014.
29. York Consortium have agreed a number of objectives that will contribute to the aims of York's new Tourism Strategy, and these will be monitored and evaluated using existing or easily devised measures. The aim of the objectives will be to increase:

- The proportion of cultural tourists from the current level to 25% by 2017, as measured by the Annual Visitor Survey, with associated increases in per capita expenditure.
 - The GVA attributable to tourism, as measured by the Regional Econometric Model, by an amount greater than the predicted trend, which is currently 2.5% per annum over the period.
30. The new Tourism Strategy will be developed in full over the period January – March 2014, and this committee will have an opportunity to contribute to its development.

Improving Evening Cultural Offer Scrutiny Review

31. In light of all the ongoing developments detailed above, it is important to identify the right focus for any cultural related scrutiny review in order not to duplicate any work ongoing by CYC and/or its partners.
32. In identifying what scrutiny review topic might positively support the work of others the following factors were considered:
- a) Statistics show York appears to have a particularly strong appeal to family parties (37%) and about one in four visitor parties include children (27%).
 - b) A fresh approach to presenting culture would attract younger visitors who currently complain of ‘nothing to do after 5pm’ (whilst it is not easy to generalise about the age groups predominating amongst cultural tourists in York there is evidence of this view)
 - c) Only about 4% of staying visitors mention a specific festival or event, suggesting that there is room to extend the offer to encourage more overnight stays.
 - d) One of the suggested actions identified within York’s Tourism Strategy Interim Document shown at Annex A is to ‘Grow the evening offer, e.g. initiate a ‘First Fridays’ concept as the initial step in encouraging new entertainment choices’
 - e) York Consortium’s planned ‘Red Letter Nights’ project will aim to improve the coordination and coherence of York’s ‘cultural offer’ and offer ‘family friendly’ activity in the right time and the right place
33. If the facts suggest that York has a strong appeal to families and with the above factors in mind, it is suggested that the scrutiny review focus on how best to achieve:

- i. An extension to the tourist family day focussing on the period between 5 - 8pm.
- ii. Encourage families to stay overnight in the city rather than starting the journey home at teatime.

Proposed Timetable & Review Remit

34. Based on the suggested review topic above, a proposed remit for the review is detailed below for the Committee's consideration:

Aim:

To identify an improved cultural offer up to 8pm in order to extend the tourist family day and encourage a greater number of families to stay overnight in the city.

Objectives:

- i) Identify best practice internationally and nationally
- ii) Identify barriers to increasing the availability of York's existing family based cultural and entertainment offer
- iii) Identify other new family orientated cultural and entertainment activities and investigate the possibility of their introduction in York
- iv) Investigate with hoteliers the opportunities for increasing the number of family one-night stays
- v) In support of the work of the York Consortium, identify what existing and new family orientated activities might contribute to their proposed 'Red Letter Night' packages

Options

35. Having considered the information provided above, Members may choose to:
- i) Carry out the review as a full committee or set up a Task Group
 - ii) Revise the suggested review remit above
 - iii) Identify tasks/consultation to be undertaken as part of the work on this review
 - iv) Agree a timeframe for completion of the review
36. The work on this review needs to be concluded and the draft final report signed off by this committee by the end of March 2014, so that it can be presented to a meeting of CSMC on 7 April 2014. In order to meet this deadline, it is suggested that a Task Group be set up to carry out the

work on the review outside of the formal scheduled meetings of the full committee.

Council Plan 2011-15

37. The proposed review supports the 'create jobs and grow the economy' priority within the Council Plan 2011-15, in that a successful York will have an enhanced reputation as a respected European and international city, with a visitor economy recognised for its high quality, bringing financial benefits to the city and its residents.

Implications & Risk Management

38. The draft remit shown at paragraph 34 above has been proposed in an effort to avoid duplication of the ongoing work being carried out by others as detailed in the report. The proposed remit will also help mitigate the risk of tourism in York becoming less sustainable and valuable to visitors and residents, as detailed in paragraphs 10 & 11.

Recommendations

39. Having considered that information within this report, the Committee are recommended to:
- Agree a remit & timeframe for the review
 - Set up a Task Group to carry out the review on behalf of the Committee

Reason: To ensure compliance with scrutiny procedures and protocols, and support the Committee's workplan.

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Report Approved



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Specialist Implications Officer(s) N/A

Wards Affected:

All

For further information please contact the author of the report

Background Papers: N/A

Annexes:

Annex A – York’s Tourism Strategy: Interim Document