

Facts and Figures on the Visitor Economy of Oxfordshire (based on 2005 data)

This report offers facts and figures related to the amount of revenue received from visitor spending across Oxfordshire. This data is the first collective set and helps portray the importance of the Visitor Economy within Oxfordshire. It also provides information about how tourism is performing locally such as the spread of visitor numbers across Oxfordshire; a breakdown of who the visitors are, i.e. domestic, international; what the purpose of their visit is; it also describes the importance of this sector by profiling the estimated number of full time equivalents and actual jobs sustained by visitor spend.ⁱ Additionally, it provides a set of baseline data that can be used to monitor the sector and raise awareness of the profile and local importance of tourism in Oxfordshire. Also the model used to collate the data is utilised by many other local authorities and therefore offers comparable data for benchmarking. (Cambridge Model 2 was used to collate and analyse the data and provides estimates.ⁱⁱ)

The headline findings from the report:

Total Value of Tourism

It is estimated that the total number of tourism trips made to and within Oxfordshire in 2005 amounted to over **22 million**, of which 2.6 million were overnight stays, with the majority being day trips (19.5 million). These visits generated a total of **£1,192,704,000** trip expenditure. Of this amount, over 90% is estimated to have directly benefited businesses in Oxfordshire.

Overnight trips	ALL TRIPS	Day trips
2.6 million	Number of trips in total	19.5 million
£529.6 million	Estimated total expenditure	£663.1 million

Drawing together direct and indirect/induced business turnover and the additional expenditure on second homes, boats and by friends and relatives, the total value of visitor expenditure to the Oxfordshire economy in 2005 is therefore estimated to be in the region of **£1.46 billion**.

Actual employment supported by tourism spending

Approximately 20,000 full time equivalent (FTE) jobs were supported by total business turnover in 2005. With the addition of part-time and seasonal jobs, it is estimated that around 27,500 actual jobs were supported across the County (which is about 10% of the working population of Oxfordshire being employed in tourism related jobs).

Total Overnight Trips

It is estimated that 2,646,000 overnight trips were made to Oxfordshire in 2005, representing 12% of total overnight trips to the region. Around 80% of all overnight trips involved British nationals (2,117,000) and the remaining 20% (529,000) involved visitors from overseas.

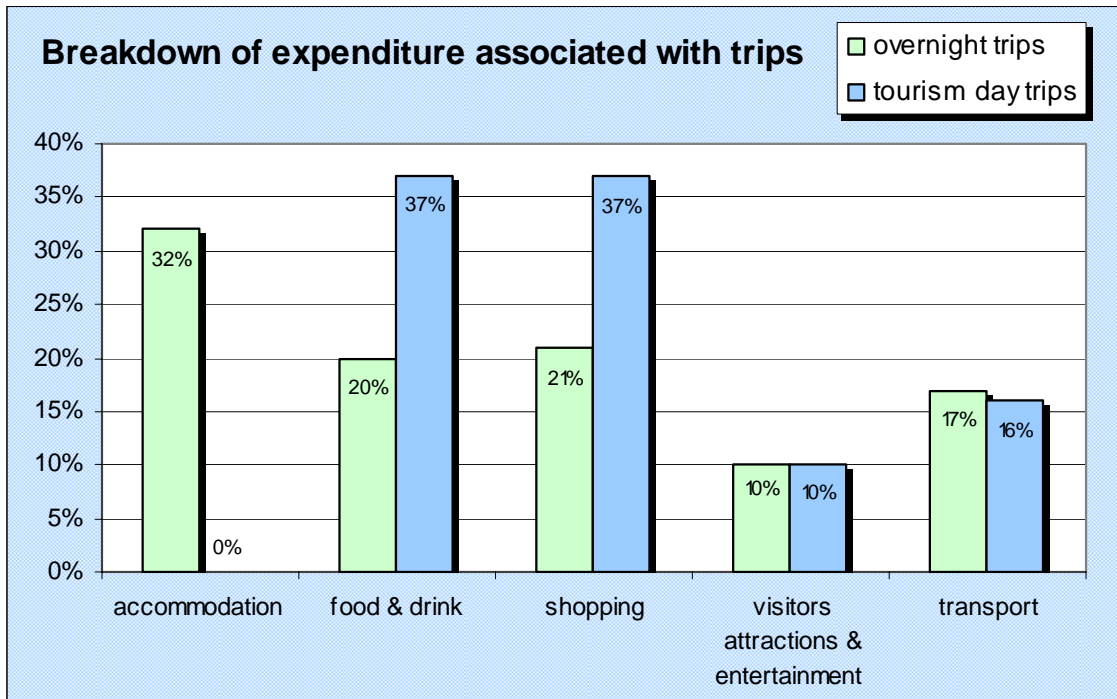
Of all overnight trips, overseas visitors tend to stay longer on average yet domestic visitors have a slightly higher number of bed nights. Whilst the numbers of overseas visitors staying overnight are less, on average their estimated spend per trip is much higher than the domestic visitor.

Domestic	OVERNIGHT TRIPS	Overseas
2.6 nights	Length of the trip	8.2 nights
5.5 million	Number of bed-nights involved	4.3 million
£317.9 million	Estimated overall trip expenditure	£211.6 million
£57.29	Estimated expenditure per night	£48.53
£150.18	Estimated expenditure per trip	£400.13

Breakdown of expenditure associated with trips

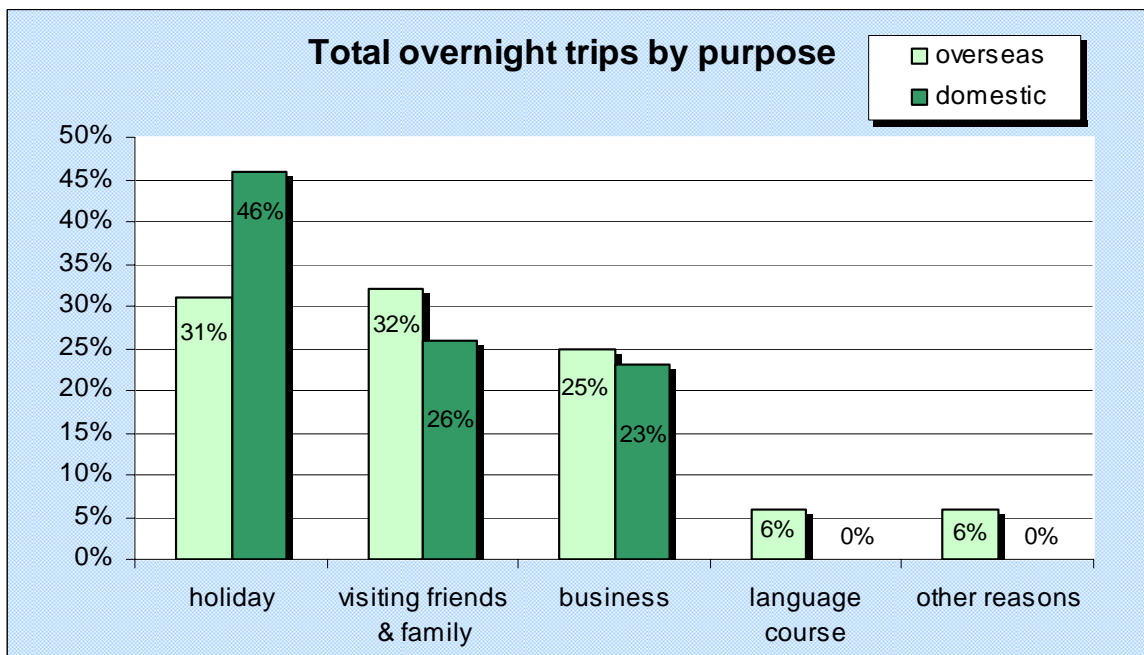
The following graph shows the breakdown of trip expenditure for all overnight visitors and day trip visitors. The main findings are that:

- overseas & domestic visitors spent similar amounts of money on accommodation and food/drink
- overseas visitors spent more than domestic on shopping and attractions/entertainment
- domestic visitors spent more than overseas on transport



Total overnight trips by purpose

The main purpose for all visitors is for holiday, although business and visiting family and friends is also popular in Oxfordshire. There are also many overseas visitors that come to Oxfordshire for the language schools.



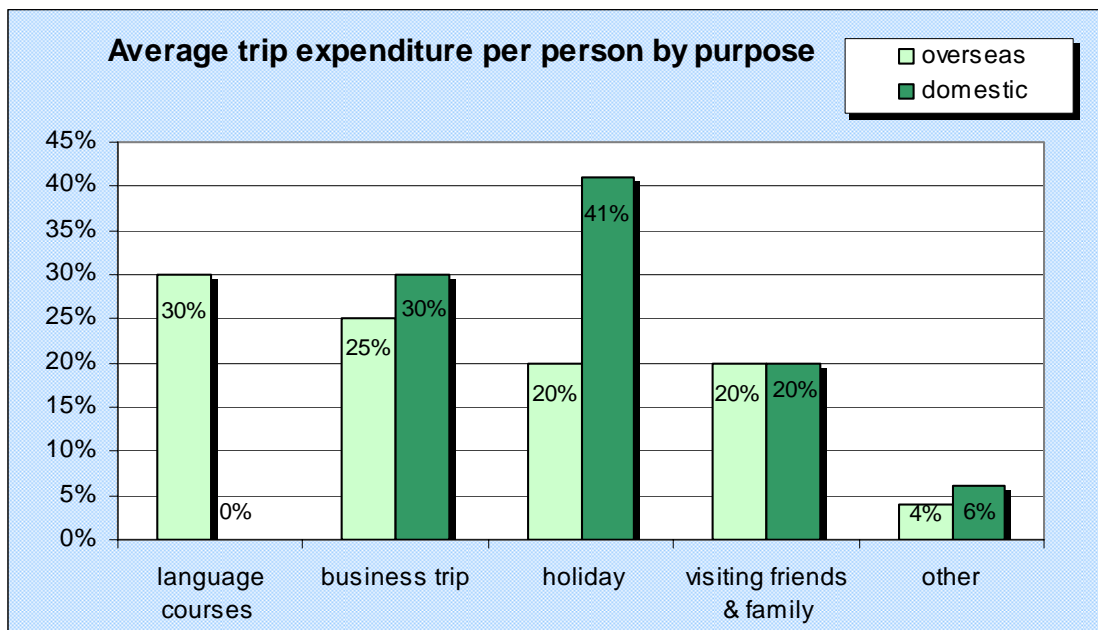
Average trip expenditure per person by purpose

Overseas trip expenditure

Surprisingly, despite total overseas trip expenditure accounting for only 6% of the volume of total overseas trips, 30% of overseas overnight trip expenditure was made by those on language courses in the County. A quarter of overseas trip expenditure came from visitors staying in the county for business purposes. Visiting friends and relatives, and holiday purposes each represented a fifth of overseas trip expenditure. Four percent of the total was spent by those visiting for other purposes.

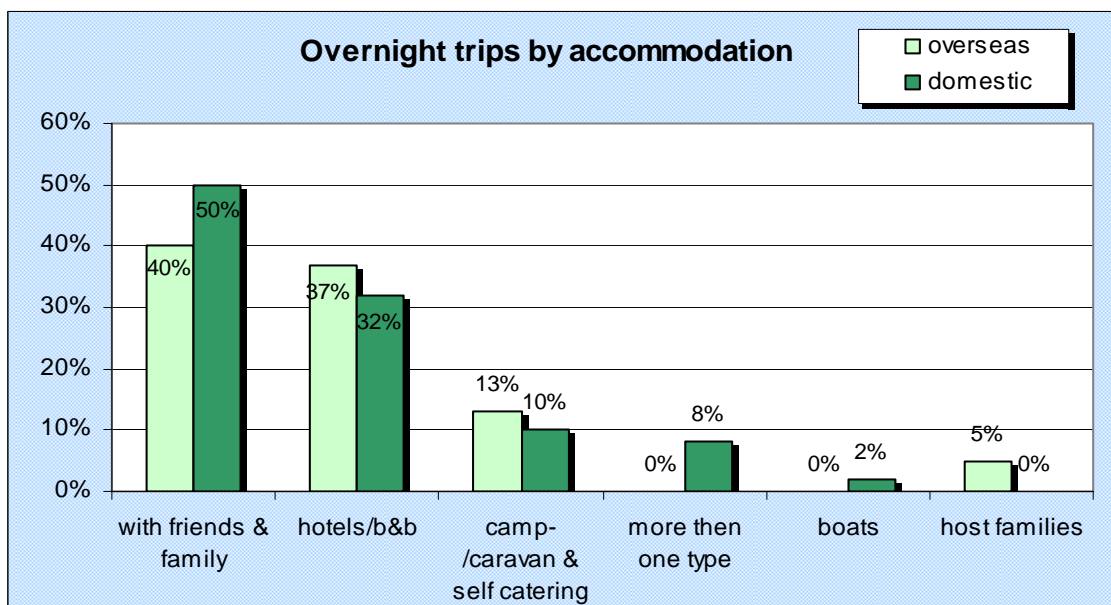
Domestic trip expenditure

Forty-one percent of total domestic overnight trip expenditure was made by those on holiday in the County. A third of total domestic trip expenditure came from visitors staying in the County for business purposes. A fifth of total domestic trip expenditure came from those visiting friends and relatives and 6% of the total was spent by those visiting for 'other' purposes. Other purposes include education and training, social or sporting events, house hunting, weddings and funerals, and where there are more than one purpose per trip.



Overnight Trips by Accommodation

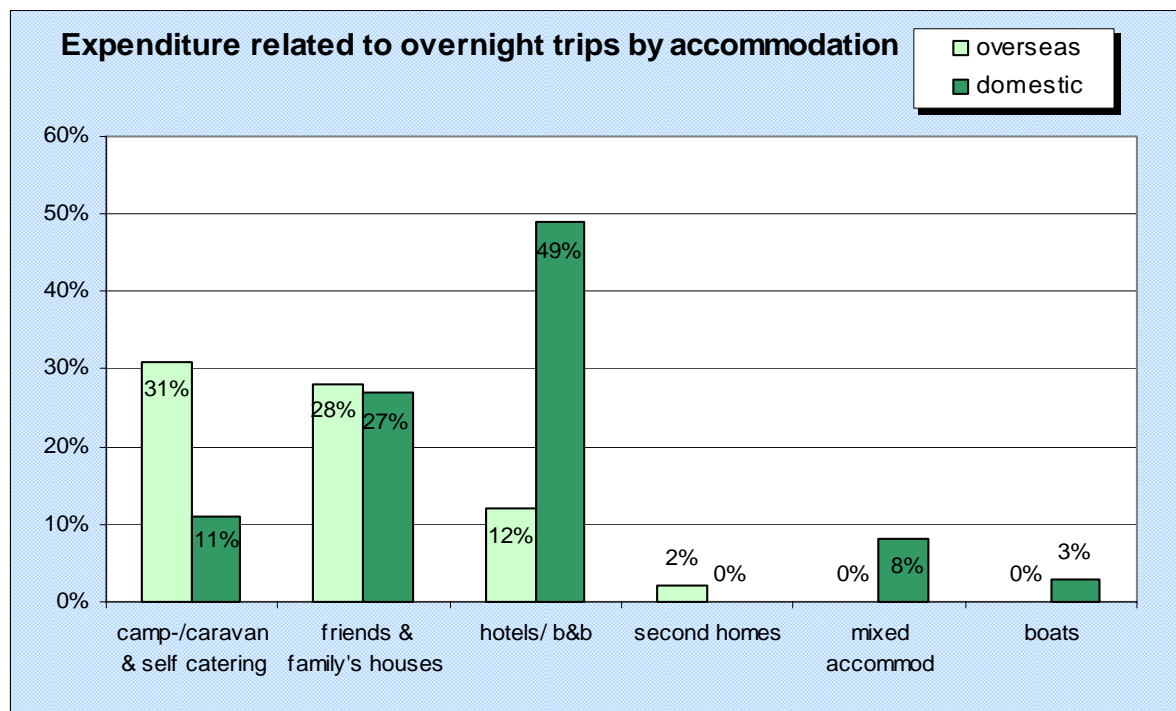
The largest proportion of overnight trips to Oxfordshire involved staying in the homes of friends or relatives. Just over a third of trips involved staying in serviced accommodation. Only 13% of all overseas overnight trips involved staying in non-serviced accommodation, which was slightly more than domestic trips. Reflecting the presence of a small minority of language students, around 5% of overseas trips involved staying in lodgings as paying guests.



Expenditure related to Overnight Trips by Accommodation

To summarise findings:

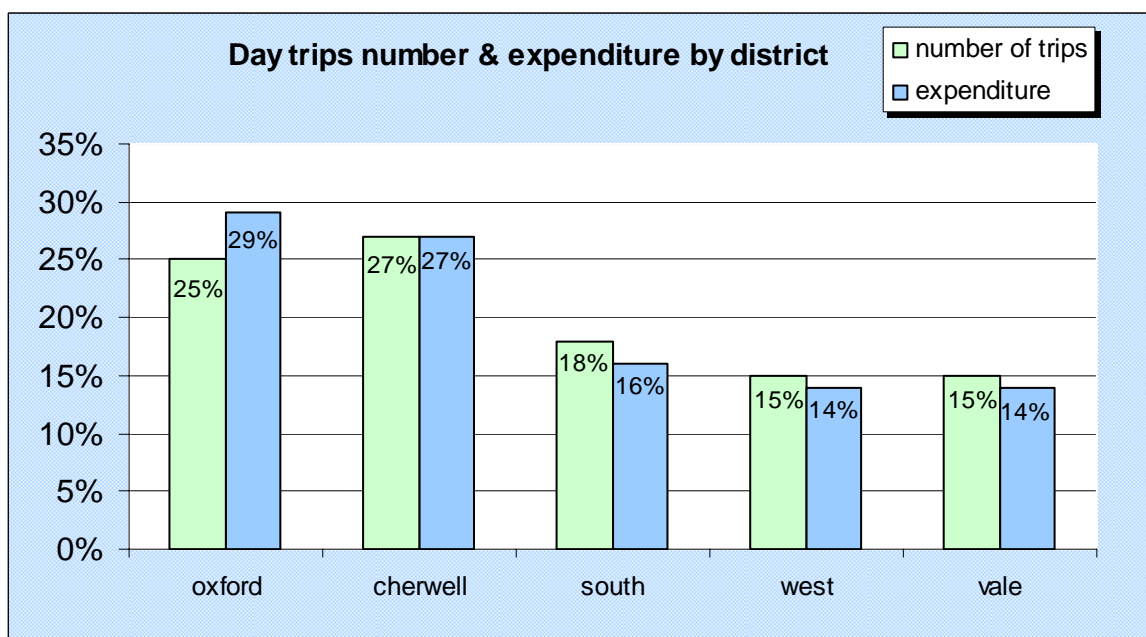
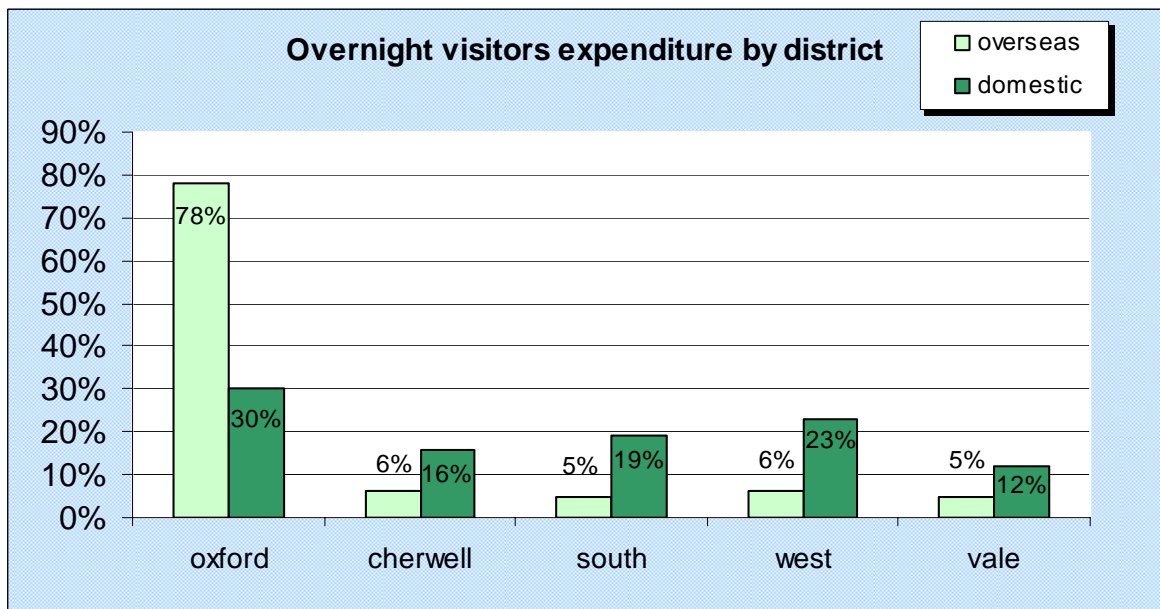
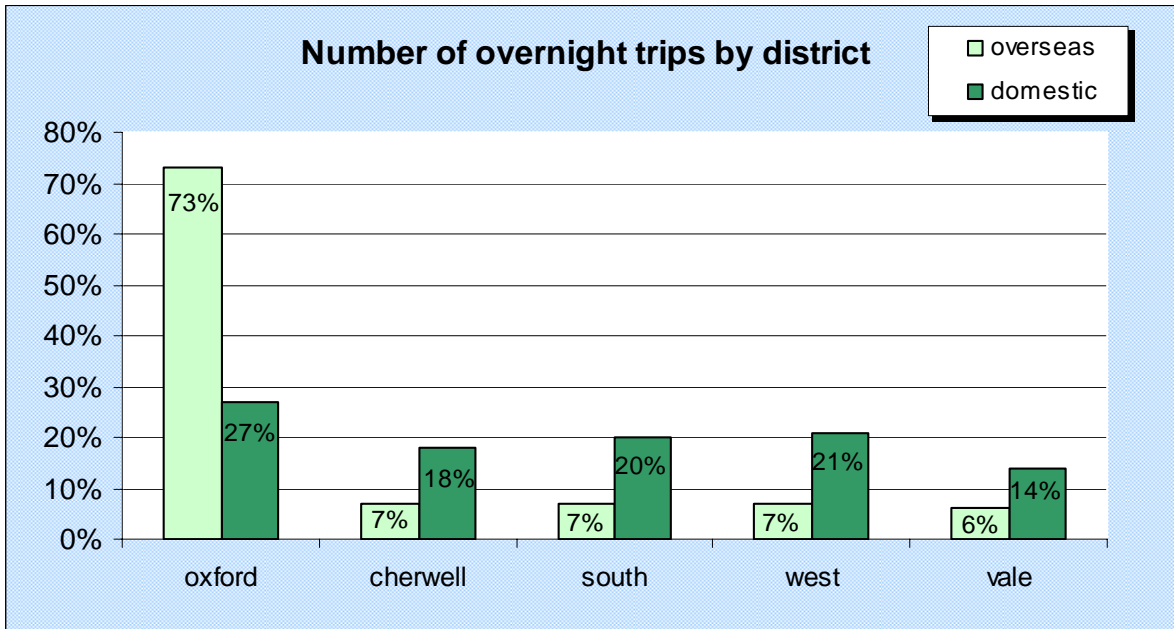
- regarding domestic trips - those staying with friends spend less than overseas visitors staying with friends and family. Also there is evidence that there is significant expenditure generated by money spent by friends and relatives on visitors
- overseas trips – language students account for only 6% of all the overseas visitors but they attribute 30% of all the expenditure
- overseas trips – non-service accommodation guests spent the most (i.e. camp/caravan sites & self catering) and also stayed the longest (18.6 nights compared to only 3 nights for those staying in hotels/b&b)



The following series of charts describe various aspects. The first chart shows the proportion of overnight trips made, by district area. In 2005 Oxford City received the majority of both domestic and overseas overnight visitors, with Oxford gaining over 70% of the market share of overseas visitors. Regarding expenditure, as expected relative to the number of visitors, Oxford gained the most revenue from visitors, particularly overseas visitors who spent £166,108,000. West Oxfordshire received the second highest share, with Vale receiving the least.

When analysing the number of day trips made to the various parts of Oxfordshire, there tends to be a more even spread of visitors. Cherwell actually received the highest number of day trips in 2005, followed by Oxford. It is thought that Bicester Village may be a contributing factor as it is very popular retail destination. Oxford still managed to retain the majority of the day trip expenditure even though they received fewer visitors than Cherwell. In total, 19,495,000 day trippers spent £ 663,104,000 within Oxfordshire.

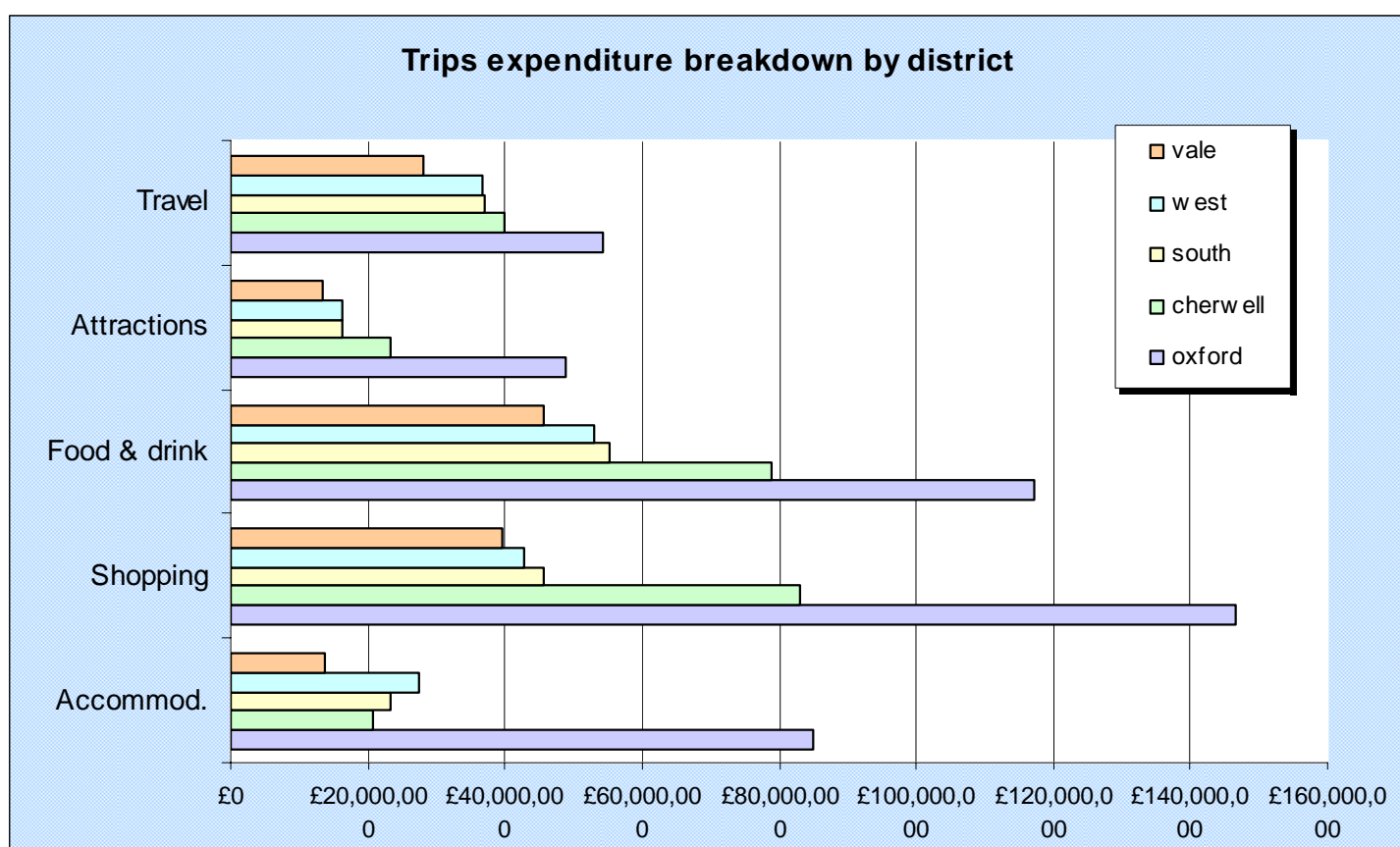
	Number of overnight trips	Expenditure by overnight visitors	Number of daytrips	Expenditure by day-trippers
Oxford	951.000	£261,463,000	4.918.000	£190,480,000
Cherwell	426.000	£64,816,000	5.169.000	£181,256,000
South	452.000	£70,535,000	3.440.000	£106,767,000
West	481.000	£85,015,000	3.005.000	£91,528,000
Vale	334.000	£47,772,000	2.963.000	£93,073,000



Breakdown of trip expenditure, by districts

The following table and chart shows the difference in spend patterns in the district areas. It shows across Oxfordshire the majority of spend was on shopping, followed by food and drink. Surprisingly, the least was spent on accommodation and attractions.

	Accommod	Shopping	Food & drink	Attractions	Travel	Total
Oxford	£85,080,000	£146,639,000	£117,080,000	£48,774,000	£54,370,000	£451,943,000
Cherwell	£20,845,000	£83,083,000	£79,030,000	£23,315,000	£39,799,000	£246,072,000
South	£23,296,000	£45,688,000	£55,128,000	£16,172,000	£37,017,000	£177,301,000
West	£27,582,000	£42,774,000	£53,044,000	£16,321,000	£36,823,000	£176,544,000
Vale	£13,688,000	£39,720,000	£45,824,000	£13,475,000	£28,138,000	£140,845,000



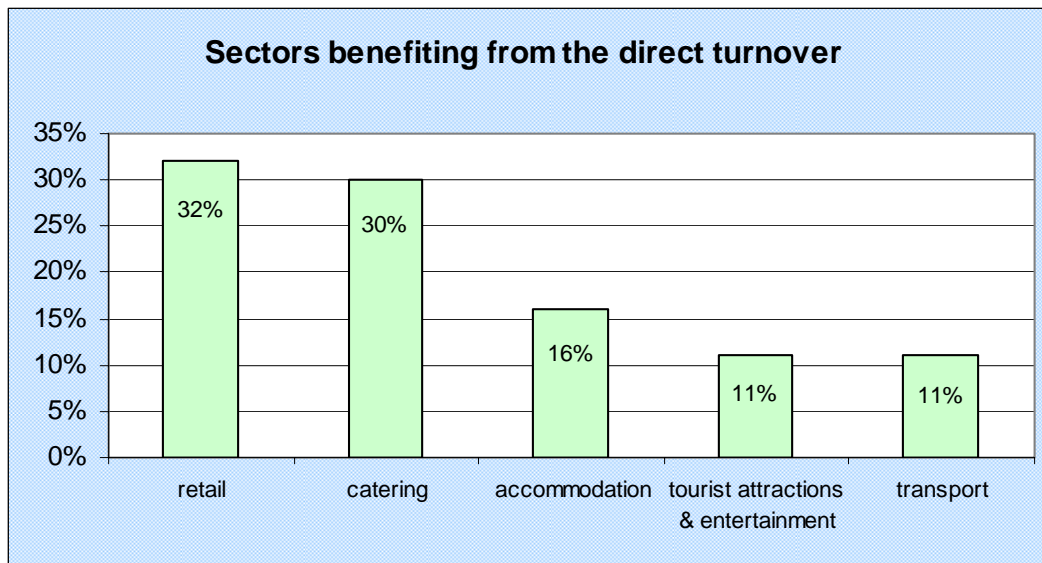
What economic benefits does tourism have for Oxfordshire businesses?

Across Oxfordshire, £1,114,202,000 is estimated to have directly benefited businesses (direct turnover). Additionally:

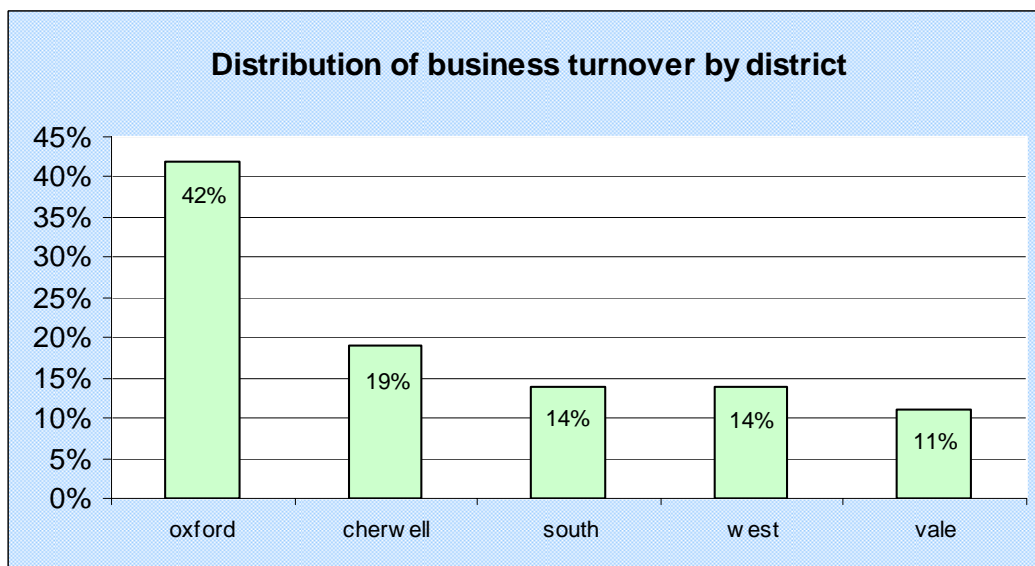
- £928,000 was generated through maintenance on second homes
- £690,000 was generated through boat related repairs & up-keep
- £72,000,000 was generated through expenditure made by friends & relatives
- £279,669,000 was generated through indirect & induced effects of visitors expenditure

Taking into account the above, the total value of tourism for the economy of Oxfordshire is estimated to amount to **£1.46 billion** in 2005.

The following chart shows sectors that benefited from visitors and their associated spend. Retail and catering received the majority of spend.



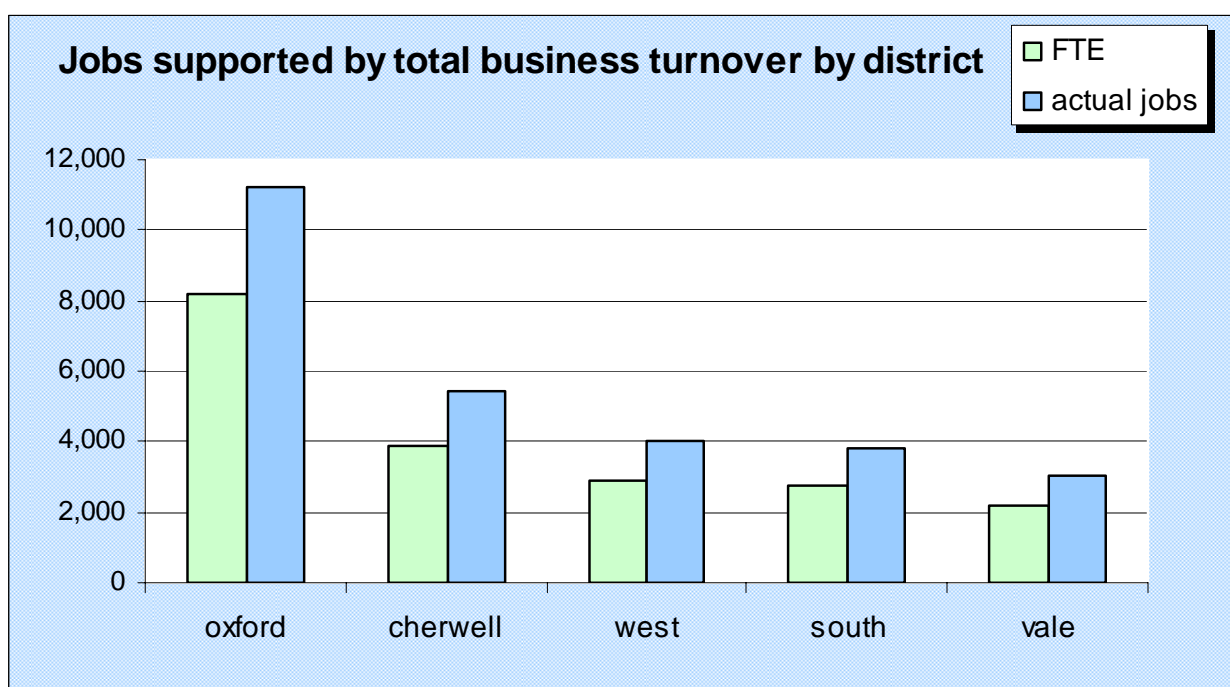
Oxford City businesses benefited the most from visitor spend, receiving over 40% of the market share. The other rural districts received a fairly equal level of remaining income.



Employment supported by total tourism business turnover, by district area

The number of FTE (full time equivalent) & actual jobs (including seasonal & part-time) created by the income generated by local businesses from tourism in 2005 is approximately 27,500 with 20,000 being FTE. In Oxfordshire this equates to approximately 10% of the working population of Oxfordshire being employed in tourism related employment.

	FTE (full time equivalent)	actual jobs
Oxford	8,203	11,227
Cherwell	3,885	5,461
West	2,870	4,012
South	2,745	3,810
Vale	2,192	3,042



For further information, or to query any of the information in this report please contact the [Economic Development](#) team.

i Source: "The Economic Impact of Tourism in Oxfordshire, Estimates for 2005: County and District Results." (prepared by Tourism South East June 2007)

ii The Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wages rates and visits to attractions. Then this locally sourced information is applied to regional estimates of tourism volume and expenditure derived from national surveys.