

## Facts and Figures on the Visitor Economy of Oxfordshire (based on 2006 data)

### 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 2006 amounted to over **23.2 million**, of which 2.5 million were overnight stays, with the majority being day trips (20.6 million). These visits generated a total of **£1,238,000,000** trip expenditure. Of this amount, over 95% is estimated to have directly benefited businesses in Oxfordshire.

Overnight trips	ALL TRIPS	Day trips
2.5 million	Number of trips in total	20.6 million
£517 million	Estimated total expenditure	£721.1 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 2006 is therefore estimated to be in the region of **£1.48 billion**.

#### Actual employment supported by tourism spending

Almost 20,000 full time equivalent (FTE) jobs were supported by total business turnover in 2006. With the addition of part-time and seasonal jobs, it is estimated that over 27,700 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 2,567,000 overnight trips were made to Oxfordshire in 2006, representing 12% of total overnight trips to the region. Compared to 2005 this represents a 3% decline. Around 78% of all overnight trips involved British nationals (1,991,000) and the remaining 22% (575,000) 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 lower, on average their estimated spend per trip is much higher than the domestic visitor. All these trends are similar to year 2005.

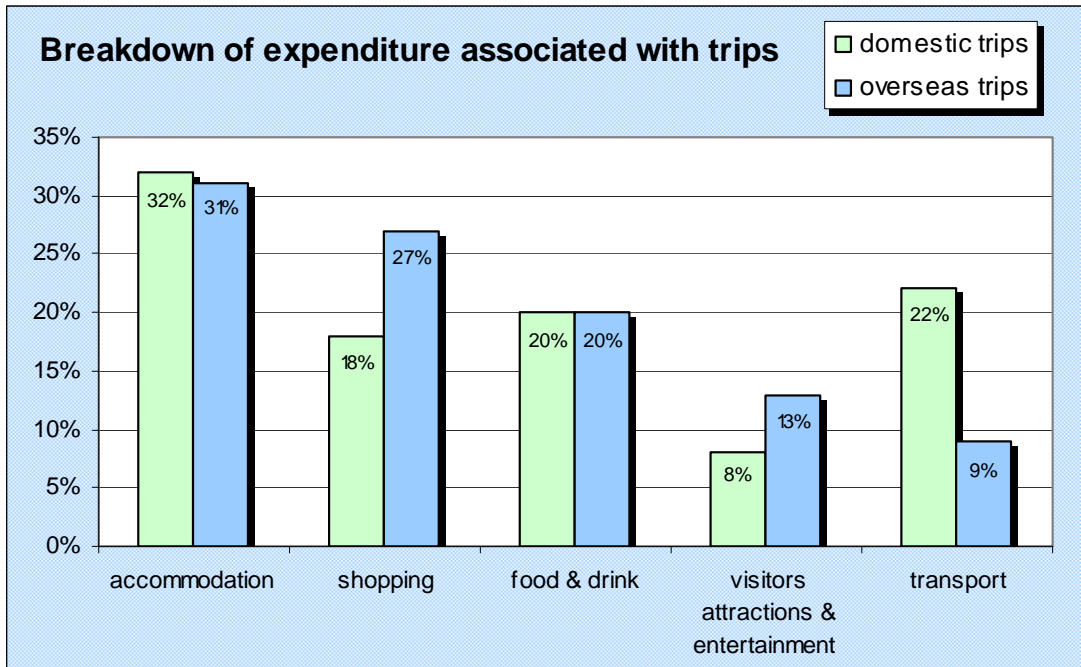
Domestic	OVERNIGHT TRIPS	Overseas
2.7 nights	Length of the trip	7.9 nights
5.4 million	Number of bed-nights involved	4.5 million
£291.52 million	Estimated overall trip expenditure	£225.5 million
£54.20	Estimated expenditure per night	£49.70
£146.42	Estimated expenditure per trip	£392.12

When comparing the overnight trips between 2005 and 2006, the number of domestic visitors (from other parts of the UK) dropped by 6%, whereas the number of visitors from outside of the UK rose by 9%.

## Breakdown of expenditure associated with trips

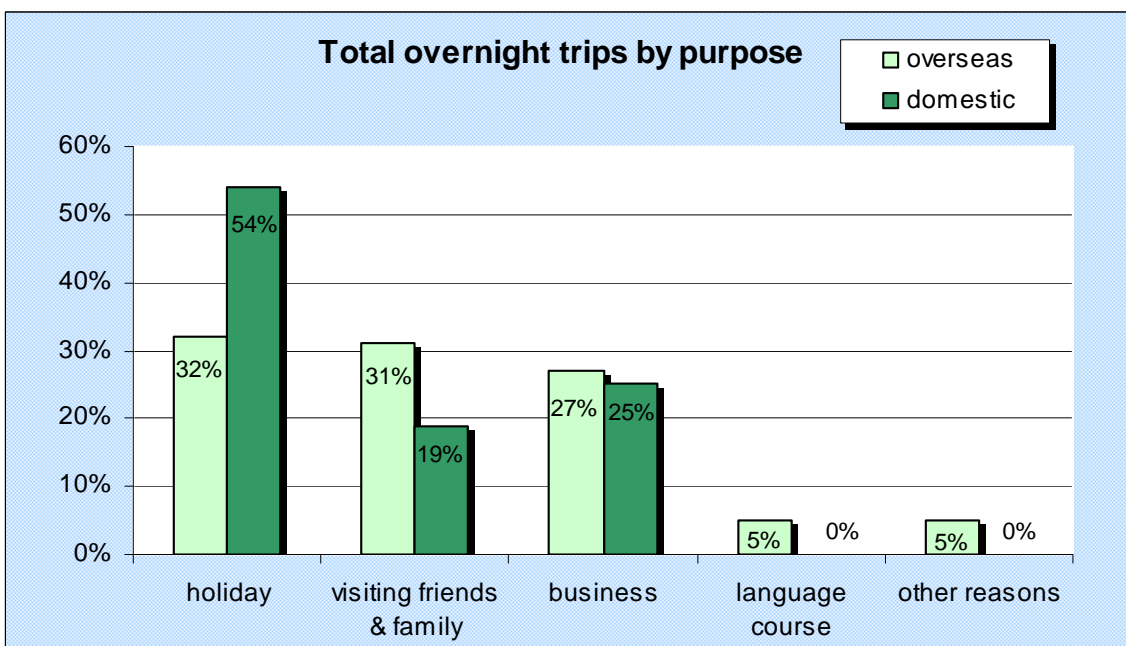
The following graph shows the breakdown of trip expenditure for all overnight visitors and day trip visitors. The main findings are that:

- 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 trips and visiting family and friends is also popular in Oxfordshire. There are also many overseas visitors that come to Oxfordshire primarily for the language schools. For overseas visitors the trip by purpose pattern was very similar to that seen in 2005. However, the number of domestic trips for holiday purposes rose by 8% compared to the year before.



## Average trip expenditure per person by purpose

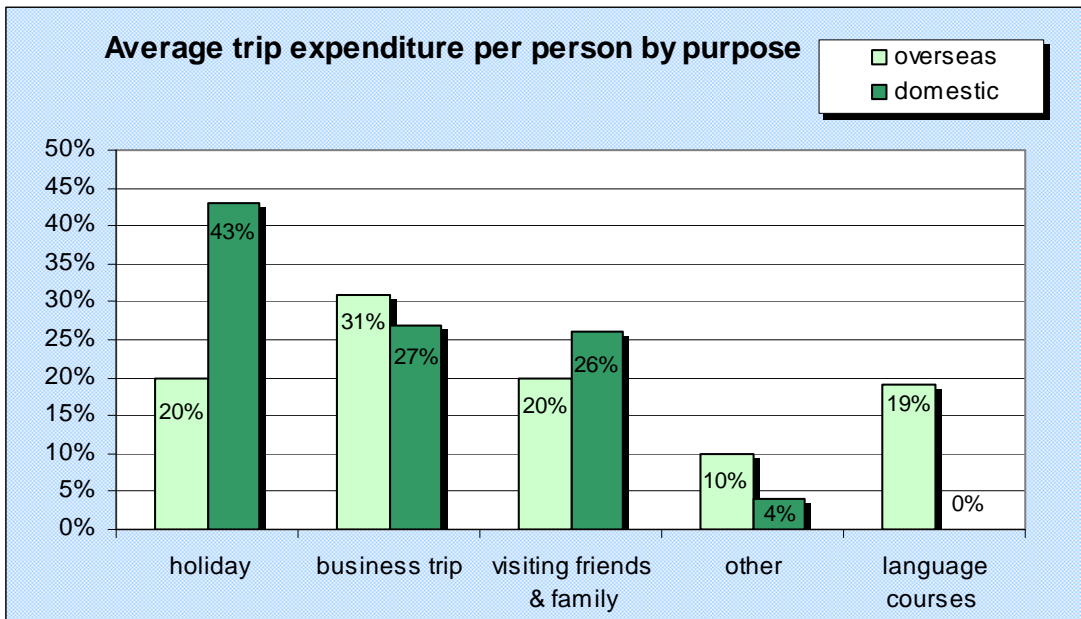
### Overseas trip expenditure

Almost 20% of overseas overnight trip expenditure was made by those on language courses in the County. However, when comparing the number of language students in 2005 and 2006 it has dropped from 30% to 19%. The number of business people from overseas rose, from 25% (in 2005) to 31% (in 2006).

A third of overseas trip expenditure came from visitors staying in the county for business purposes suggesting this is an increasing sector of visitors. Those visiting friends and relatives, and for holiday purposes each represented a fifth of overseas trip expenditure. Ten percent of the total number of visitors was for other purposes.

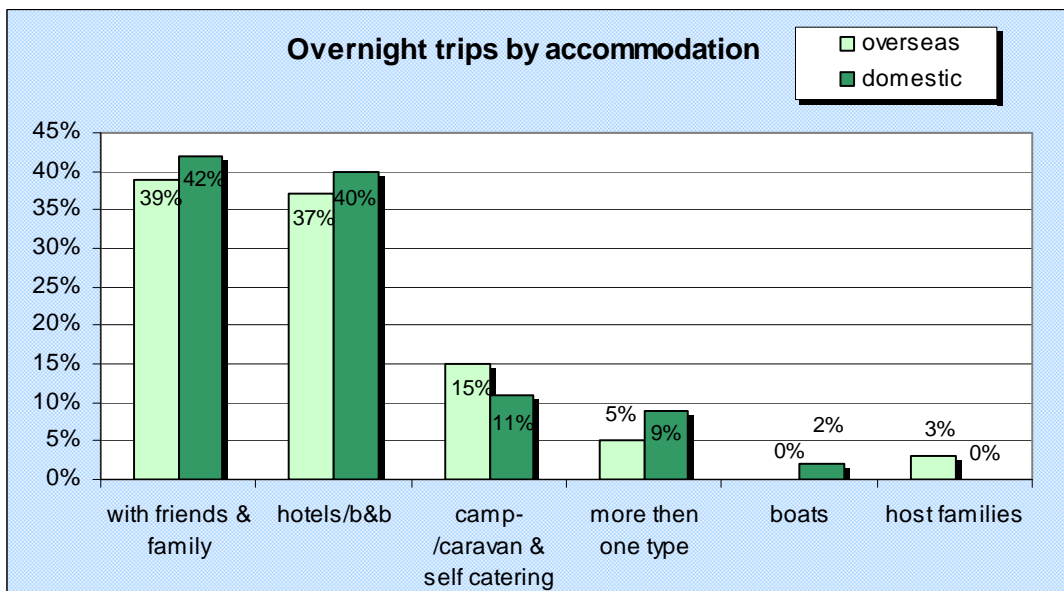
### Domestic trip expenditure

Forty-three percent of total domestic overnight trip expenditure was made by those on holiday in the County. Almost a third of total domestic trip expenditure came from visitors staying in the County for business purposes. A quarter of total domestic trip expenditure came from those visiting friends and relatives (VFR) and 4% 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. When comparing the figures with the data from 2005, all numbers dropped except for the VRF market which rose by 6%.



## Overnight Trips by Accommodation

The largest proportion of overnight trips to Oxfordshire involved staying in the homes of friends or relatives; this is a similar trend to that in 2005. However, the number of domestic visitors staying with friends and family has fallen slightly since 2005 (by 8%) but the number of domestic visitors staying in serviced accommodation rose by 8%. Only 15% 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 3% of overseas trips involved staying in lodgings as paying guests.



## Expenditure related to Overnight Trips by Accommodation

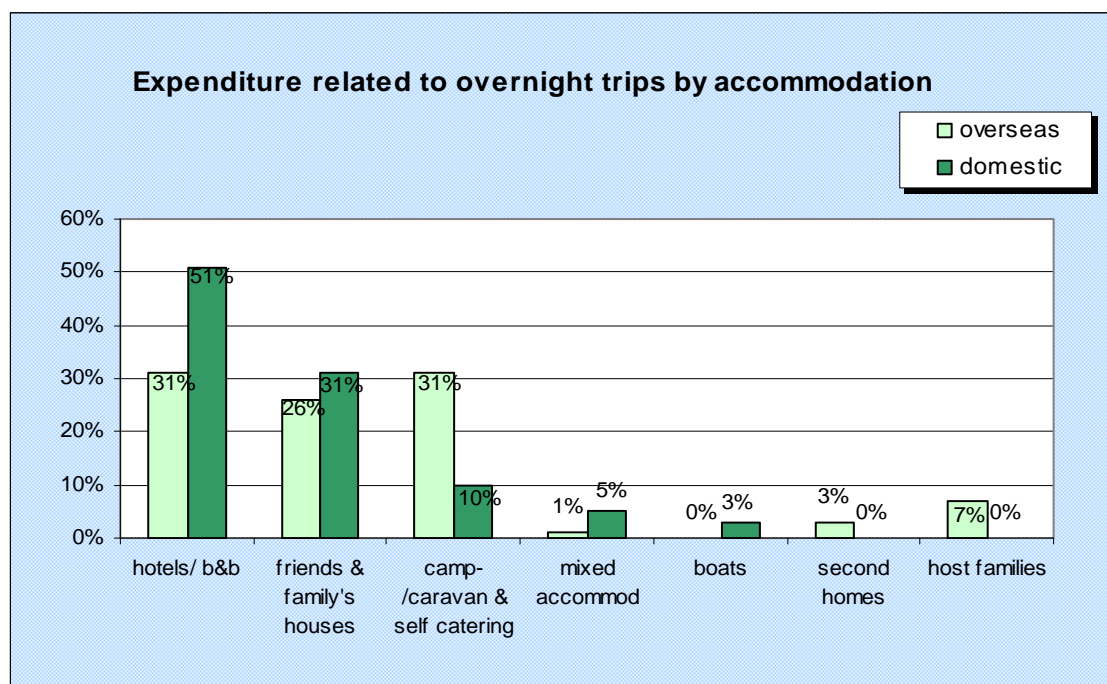
To summarise findings:

- regarding domestic trips - those staying with friends spend more 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. The biggest expenditure was by those staying in serviced accommodation, just over 50% of all domestic visitors.

When compared to 2005 the expenditure associated with domestic overnight trips **dropped by 8%**.

- overseas trips – non-service accommodation guests (i.e. camp/caravan sites & self catering) spent the same as serviced accommodation guests, both just over 30%, almost 20% of the overseas expenditure was made by those on language courses despite accounting for only 5% of the volume of total overseas trips.

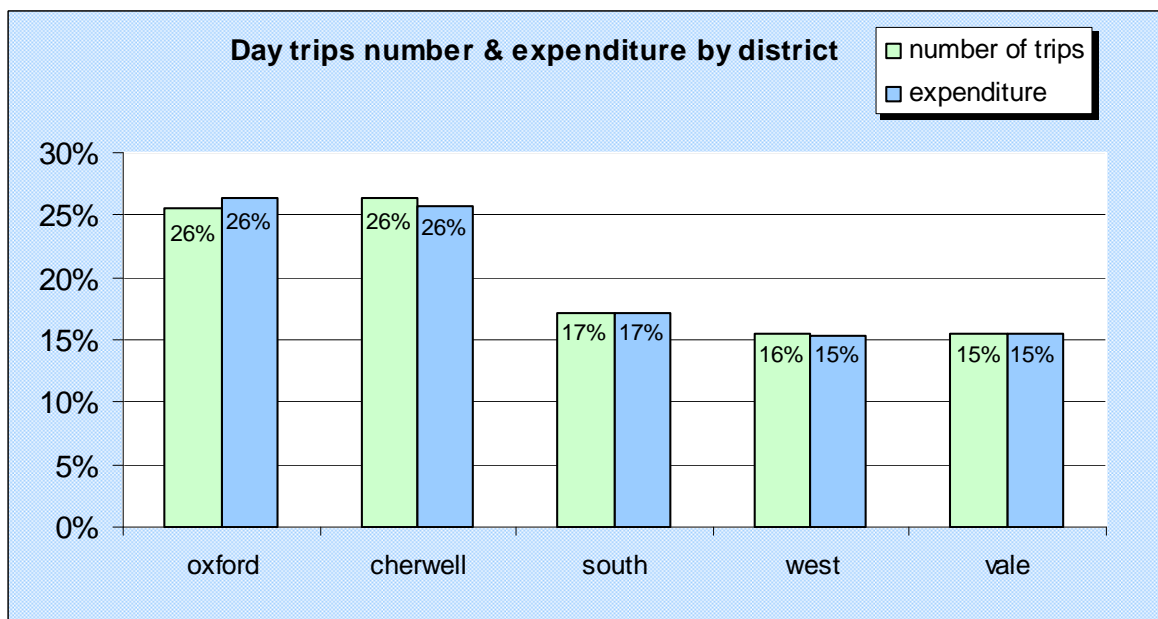
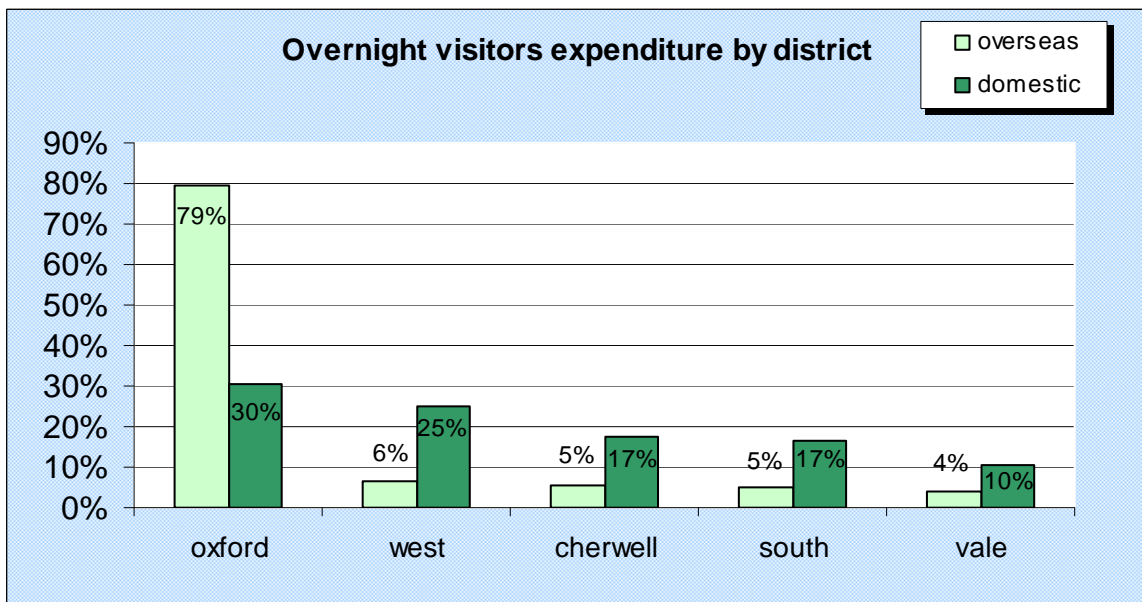
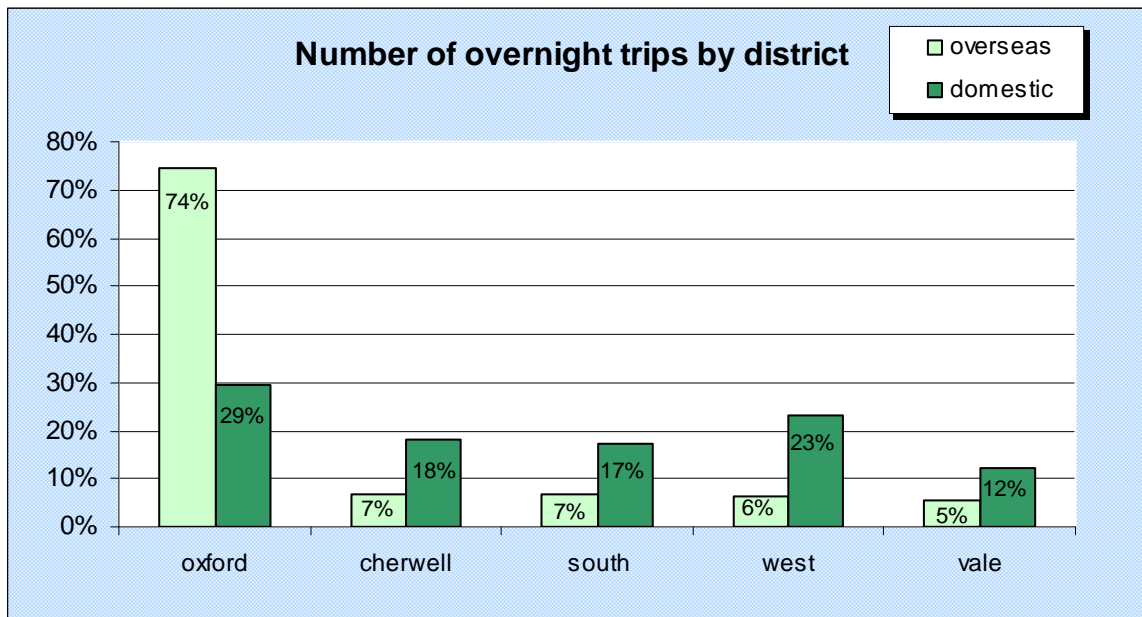
When compared to 2005 the expenditure associated with overseas overnight trips **rose by 7%**.



The following series of charts describe various aspects. The first chart shows the proportion of overnight trips made, by district area. In 2006, similarly to 2005, Oxford City received the majority of both domestic and overseas overnight visitors. Overall, comparing 2005 and 2006, there was a slight increase in the number of visits to all districts areas, with South and Vale experiencing a small drop (average by 1%) in both domestic and overseas visitors. Regarding expenditure, as expected relative to the number of visitors, Oxford gained the most revenue from visitors, particularly overseas visitors who spent £179,216,000, which represents 8% increase compared to 2005. West Oxfordshire again received the second highest share (with an increase by 13% compared to 2005), with Vale receiving the least (with a change by -10% compared to year before).

When analysing the number of day trips made to the various parts of Oxfordshire, there tends to be a more even spread of visitors. Similarly to 2005 data, Cherwell once again received the highest number of day trips in 2006, followed by Oxford. It is thought that Bicester Village is a contributing factor to high numbers in Cherwell as it is a very popular retail outlet destination. Oxford still managed to retain the majority of day trip expenditure even though they received fewer visitors than Cherwell. In total, 20,636,324 day trippers spent £ 721,082,000 within Oxfordshire. This represents a 5% increase in the number of day trippers, and an 8% increase in their expenditure when comparing to the year before.

	Number of overnight trips	Expenditure by overnight visitors	Number of daytrips	Expenditure by day-trippers
Oxford	968,000	£254,229,000	5,267,000	£189,623,000
Cherwell	421,000	£66,434,000	5,428,000	£185,490,000
South	399,000	£63,887,000	3,547,065	£123,590,000
West	507,000	£91,166,000	3,200,988	£110,848,000
Vale	279,000	£41,278,000	3,193,271	£111,531,000



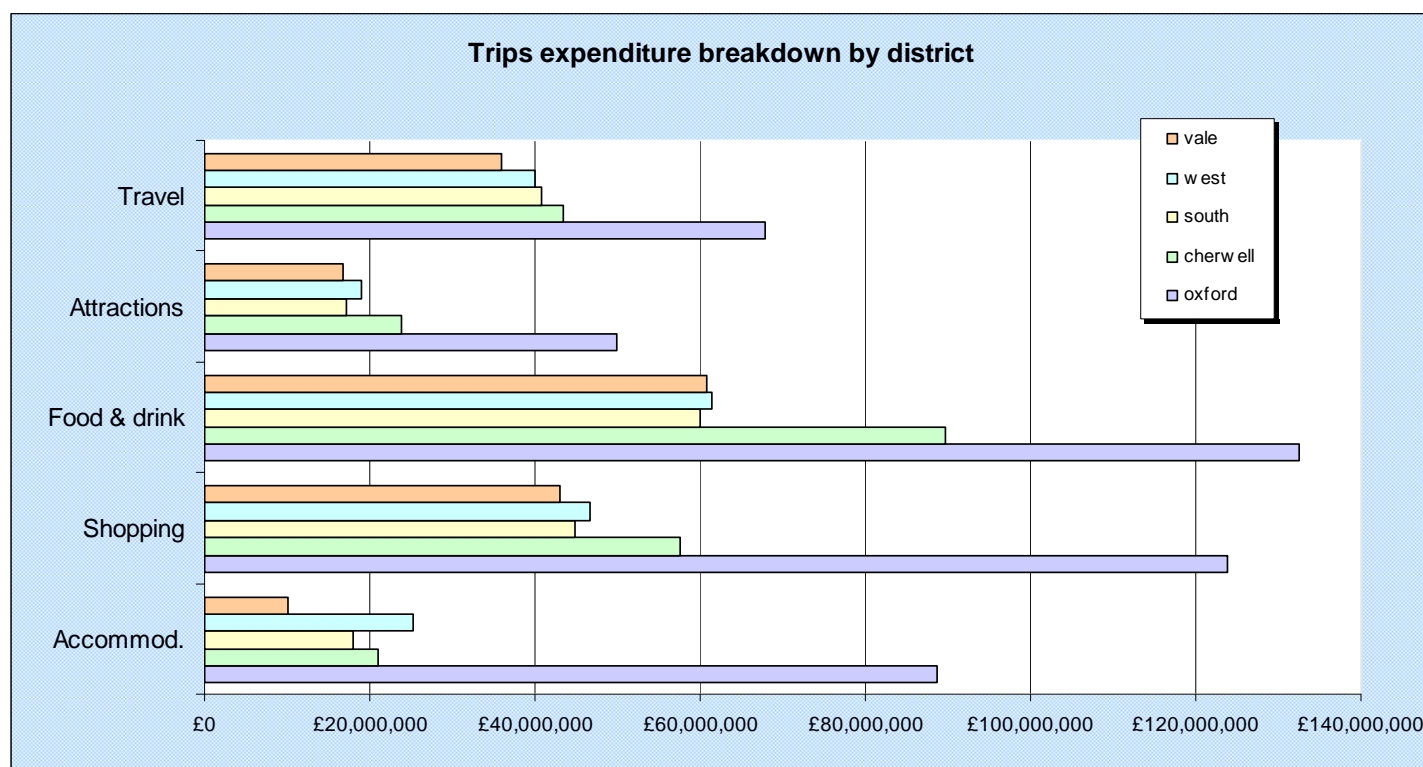
## Breakdown of trip expenditure, by districts

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

When comparing this data with 2005, the major changes show that there was a general drop in expenditure on shopping across all districts, with Cherwell experiencing the highest decrease by 10%, Oxford by 5%, Vale by 2%, South by 1%, whilst West managed to maintain the same levels compared to last year. This falling trend was also reflected in catering with similar proportions.

What is not shown in the table is the pattern between overseas and domestic trip expenditure on shopping, attractions and transport are rather different – with visitors spending more on shopping and attractions, and domestic visitors spending more on transport.

	Accommod	Shopping	Food & drink	Attractions	Travel	Total
Oxford	£88,783,000	£123,820,000	£132,517,000	£49,804,000	£67,946,000	£462,870,000
Cherwell	£20,913,000	£57,478,000	£89,625,000	£23,882,000	£43,524,000	£235,422,000
South	£18,033,000	£44,916,000	£60,057,000	£17,118,000	£40,724,000	£180,848,000
West	£25,191,000	£46,676,000	£61,477,000	£19,016,000	£39,981,000	£191,341,000
Vale	£10,157,000	£43,009,000	£60,815,000	£16,678,000	£35,937,000	£166,596,000



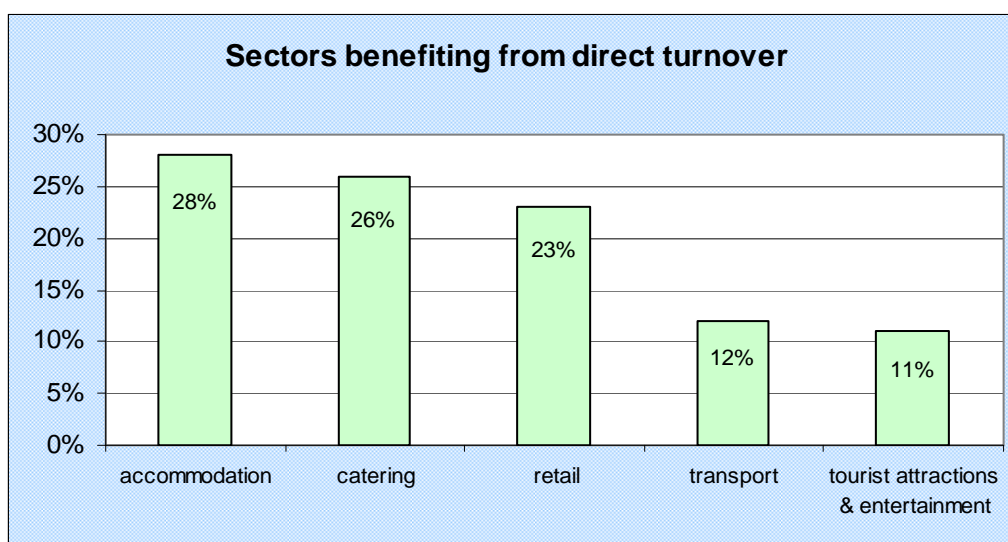
## What economic benefits does tourism have for Oxfordshire businesses?

Across Oxfordshire, £1,204,880,000 is estimated to have directly benefited businesses (direct turnover). Additionally:

- £1,163,000 was generated through maintenance on second homes
- £690,000 was generated through boat related repairs & up-keep
- £56,762,000 was generated through expenditure made by friends & relatives
- £447,691,000 was generated through indirect & induced effects of visitors expenditure

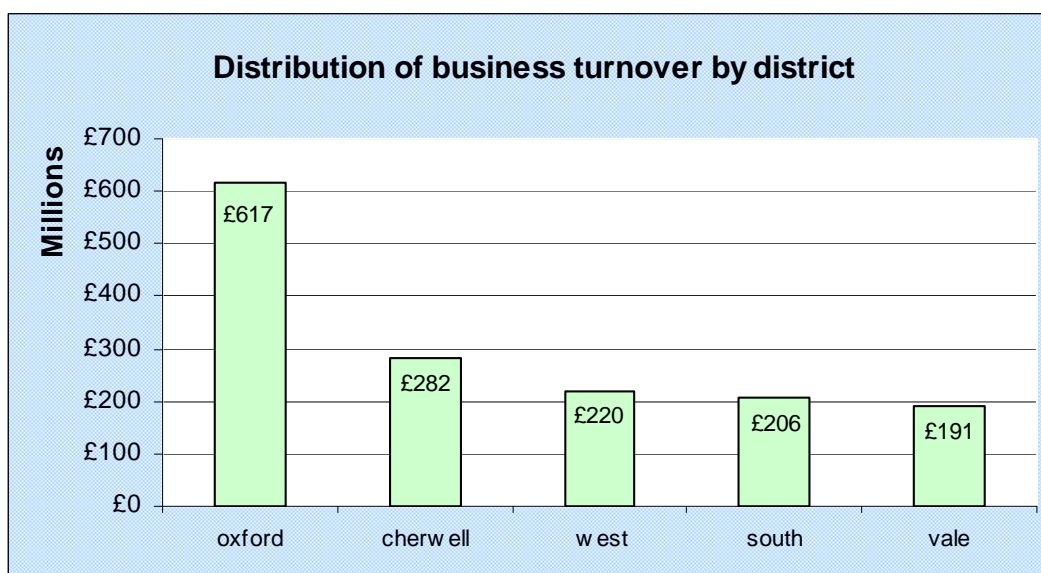
Taking into account the above, the total value of tourism for the economy of Oxfordshire is estimated to amount to **£1.65 billion** in 2006, a growth of 13% since 2005.

The following chart shows sectors that benefited from visitors and their associated spend. Accommodation and catering received the majority of spend. These numbers look different when comparing to the year before where the retail sector gained the most from visitor expenditure (32%) and the accommodation sector acquired much less (16%). Overall, the total turnover for all sectors was higher in 2006 (£1,138,853,005) then last year, 2005, (£1,114,202,000).



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 the remaining income.

When comparing those numbers to the year before the turnover for West Oxfordshire rose by the highest amount (8%), whereas Cherwell experienced the greatest decrease (-4%).



## Employment supported by total tourism business turnover, by district area

The following table and graph show the number of FTE (full time equivalent) & actual jobs (including seasonal & part-time) created by income generated by local businesses from tourism in 2006 is approximately 27,752 with 20,202 being FTE, showing a growth of 1% since 2005. 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	8,490	11,401
Cherwell	3,890	5,425
West	2,869	4,038
South	2,697	3,799
Vale	2,256	3,089

