

## Facts and Figures on the Economic Impact of Tourism in Oxfordshire (based on 2007 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 2007 amounted to over **23.5 million**, of which 2.5 million were overnight stays, with the majority being day trips (20.9 million). These visits generated a total of **£1,248,147,000** trip expenditure. Of this amount, £1.21 million directly benefits local businesses showing a 1.4% increase on 2006.

Overnight trips	ALL TRIPS	Day trips
2.54 million	Number of trips in total	20.9 million
£517.4 million	Estimated total expenditure	£730.7 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 2007 is therefore estimated to be in the region of **£1.49 billion**, a small growth of 0.6% since 2006.

#### Actual employment supported by tourism spending

Almost 20,299 full time equivalent (FTE) jobs were supported by total business turnover in 2007. With the addition of part-time and seasonal jobs, it is estimated that over 27,749 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 2,535,000 overnight trips were made to Oxfordshire in 2007, compared to 2006 this represents a 1.2% decline, however there was a marginal increase in spend of 0.1% compared to 2006.

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 previous years.

Domestic	OVERNIGHT TRIPS	Overseas
2.56 nights	Length of the trip	7.28 nights
4.9 million	Number of bed-nights involved	4.27 million
£287 million	Estimated overall trip expenditure	£230 million
£57.63	Estimated expenditure per night	£53.86
£147.51	Estimated expenditure per trip	£391.95

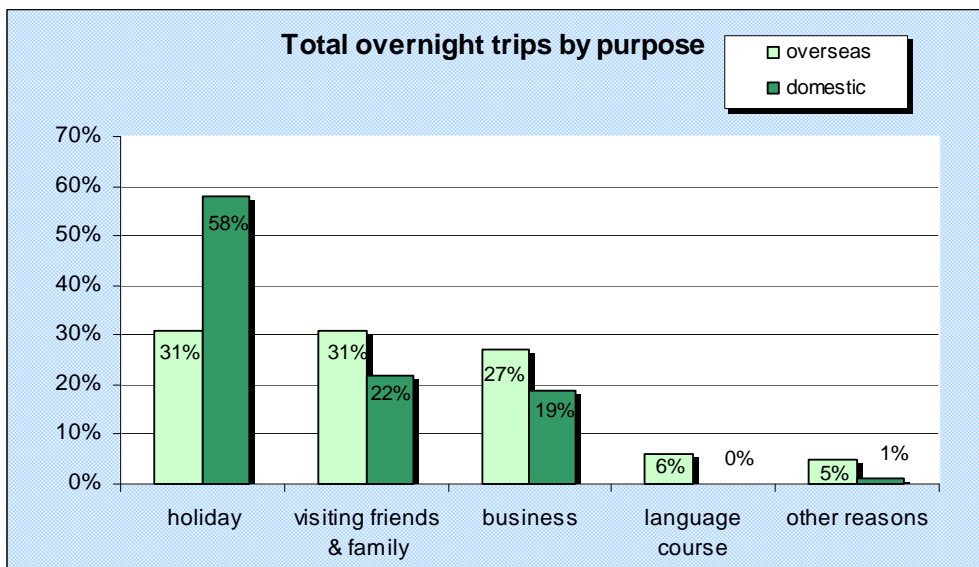
When comparing the overnight trips between 2007 and 2006, the number of domestic visitors (from other parts of the UK) fell from 5.4 million bed nights to 4.9 million. There was also a slight decrease in overseas overnight visitors. However of those domestic and overseas visitors, both spent more in the local economy on their trips which tells us that there are slightly less visitors yet the overall spend in the economy is increased.

#### 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

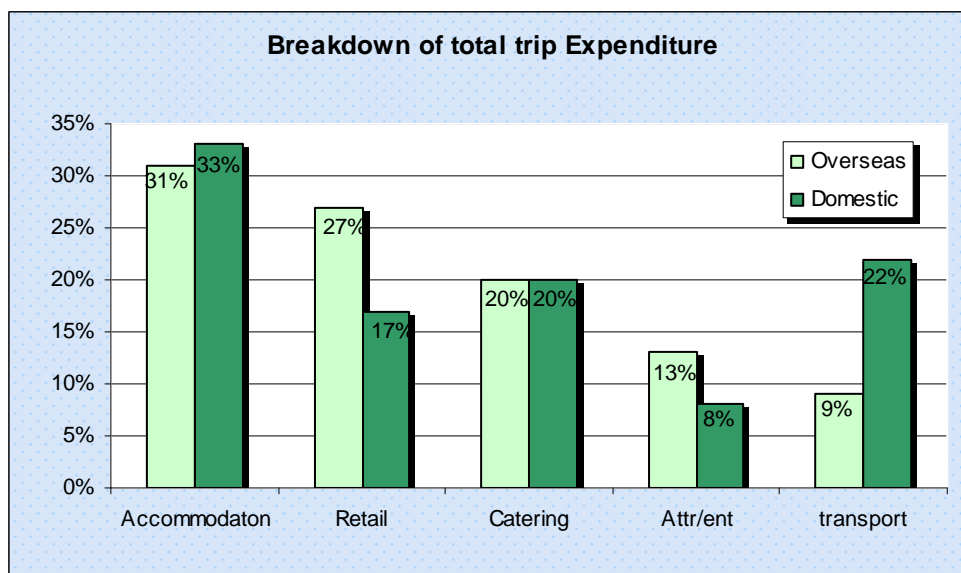
language schools. Approximately half a million (587,000) overnight trips were made to Oxfordshire in 2007 by visitors from outside the UK. Compared to 2006, this represents a 1.9% increase. Also just under 2 million overnight trips (1,948,000) were made to Oxfordshire in 2007 by visitors from other parts of the UK. Compared to 2006 this represents a decline of 2%.

For overseas visitors, holidays and VFR trips were equally important in terms of purpose each representing 31% respectively. Business trips were also very significant accounting for just over a quarter (27%) all overseas overnight trips. Around 6% of overseas trips were made by language students. The remaining 5% were made for a number of other reasons.



### Average trip expenditure per person by purpose

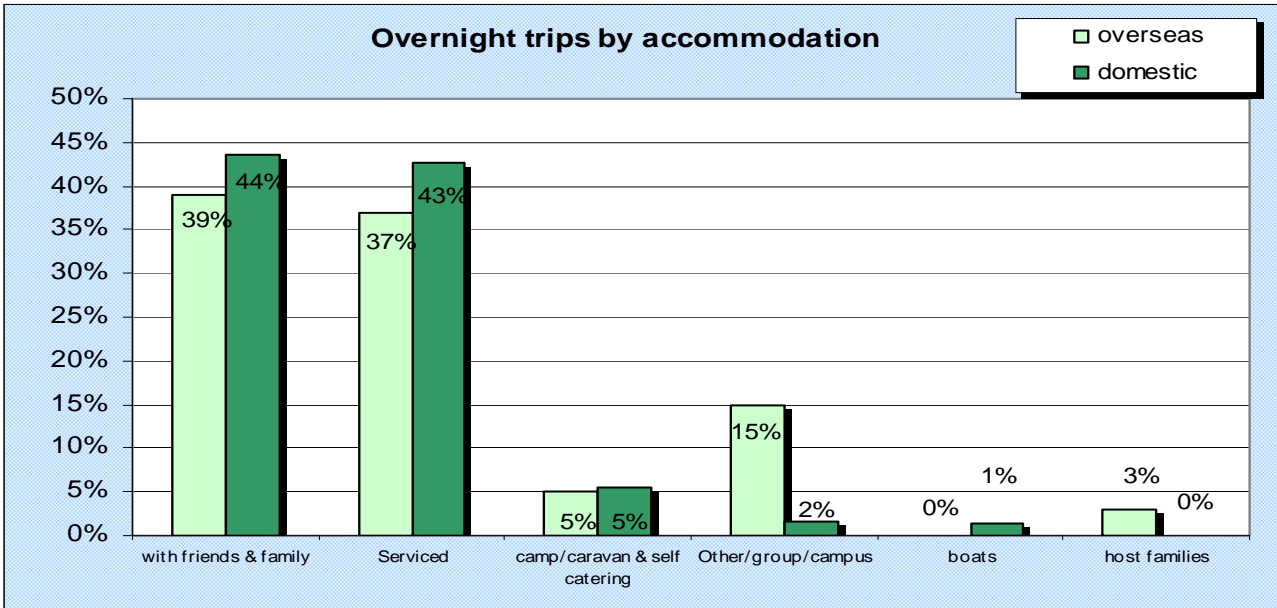
Visitors coming to Oxfordshire for a holiday, for both overseas and domestic visitors, generated the highest income for Oxfordshire. The second largest spend was by business visitors with overseas visitors spending more on average than a domestic business visitor.



21% of overseas overnight trip expenditure was by those on language courses in the County. This has risen 2% from 2006. The number of business people from overseas saw a decline from 31% in 2006 to 23% in 2007 which reflects a national decline in business tourism. Domestic visitors who stayed with friends and family saw their expenditure within Oxfordshire rise by 5% compared to 2006. Holidaying visitors, both overseas and domestic saw a rise in spend from 2006 (overseas visitors average trip expenditure on holidays rose by 9% compared to 2006, and domestic visitors trip expenditure rose from 43 to 51%).

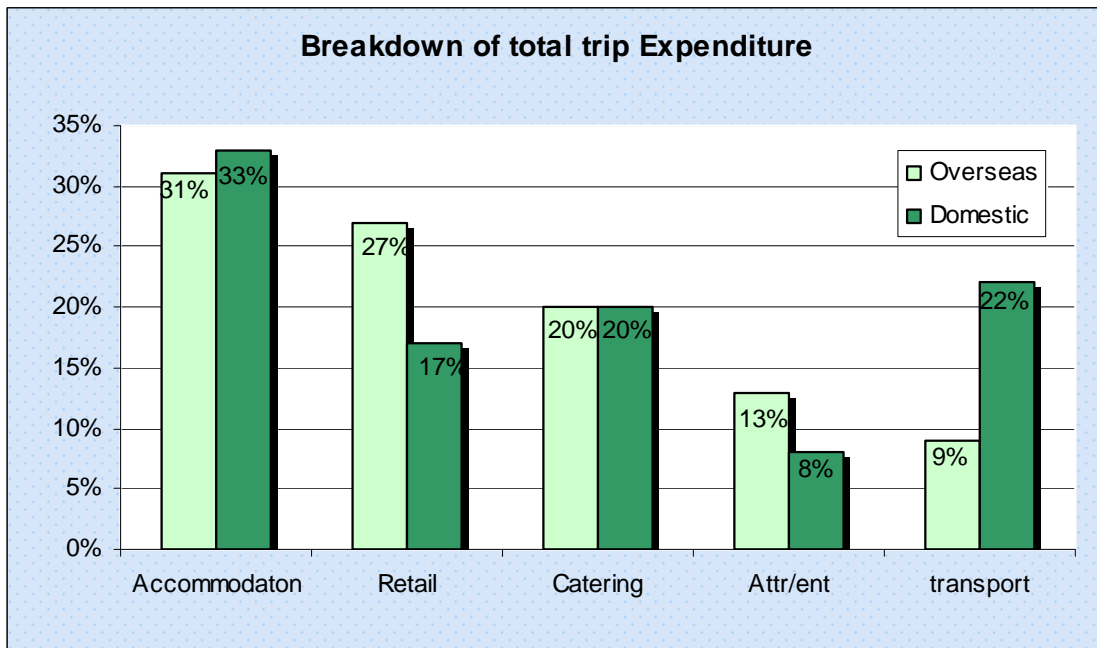
## Overnight Trips by Accommodation

The largest proportion (39%) of overseas overnight trips to Oxfordshire involved staying in the homes of friends or relatives. Just over a third of trips (37%) involved staying in serviced accommodation. Around 15% of all overseas overnight trips involved staying in non-serviced accommodation. Reflecting the presence of a small minority of language students, around 3% of overseas trips involved staying in lodgings as paying guests.

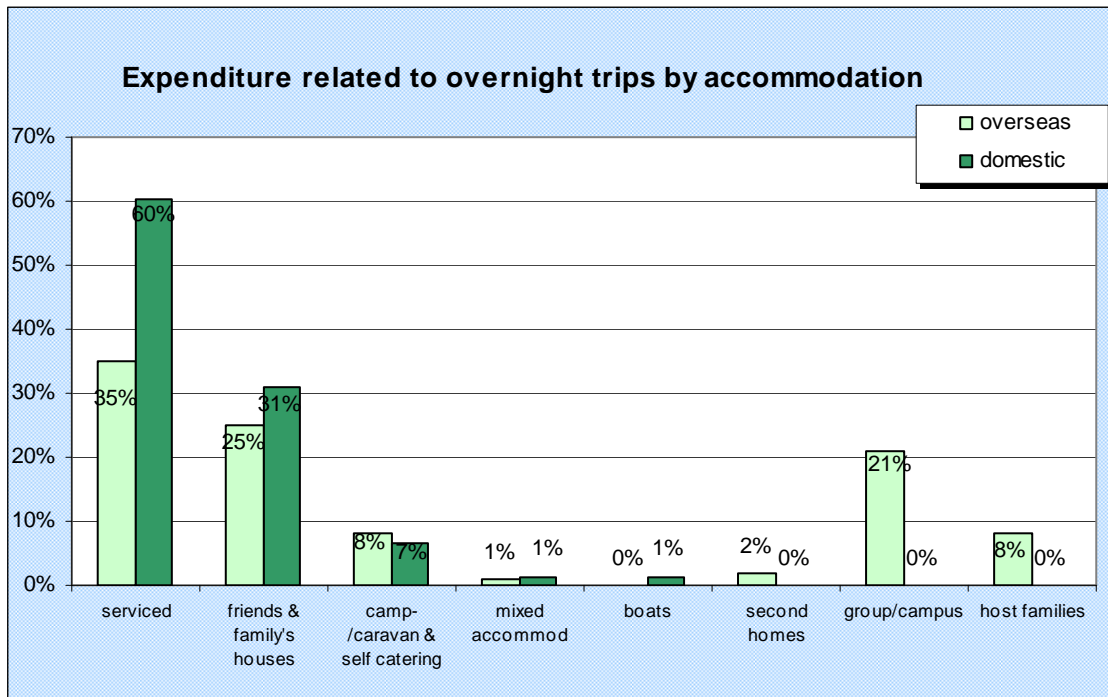


## SECTOR BREAKDOWN OF TOTAL TRIP EXPENDITURE

Unsurprisingly, the largest volume of total domestic and overseas staying trip expenditure went towards the cost of accommodation (33% and 31% respectively). Seventeen percent of domestic trip expenditure went towards shopping. Overseas visitors spend considerably more on shopping with 27% of all their expenditure going towards shopping. Domestic visitors spent more than overseas on transport.

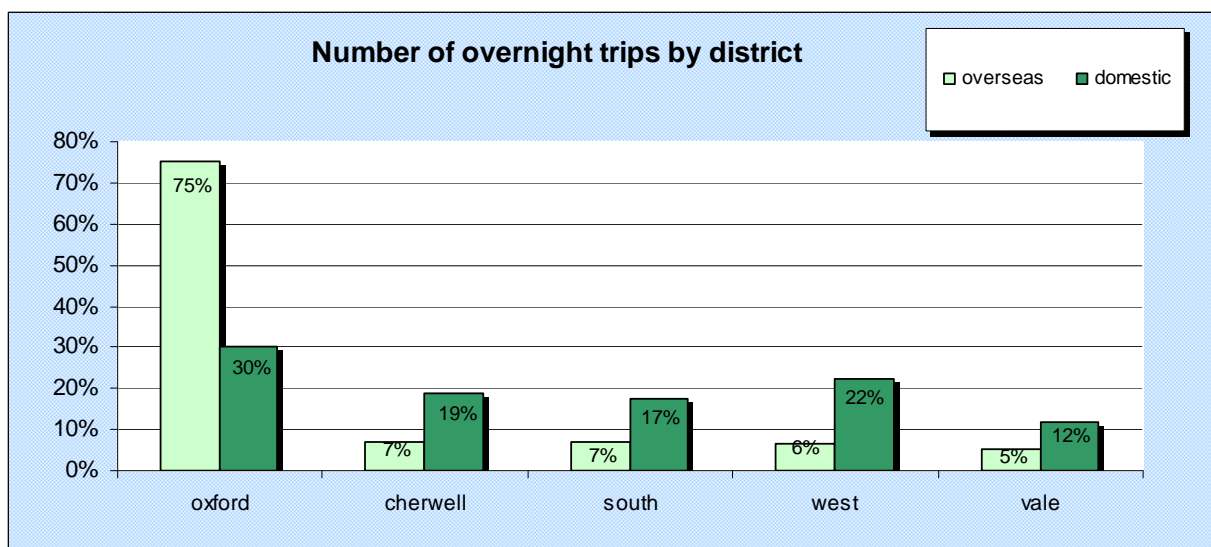


With regards to the differences in visitors choice of accommodation and what they spend, serviced accommodation which includes hotels b&b's, guesthouses etc received the highest proportion of visitor expenditure. The visiting friends and family category attracted the second highest amount of expenditure for both domestic and overseas visitors which suggests whilst they don't spend on accomodation as such, they do spend within the local economy and do more so than campers and those in self catering accomodation.



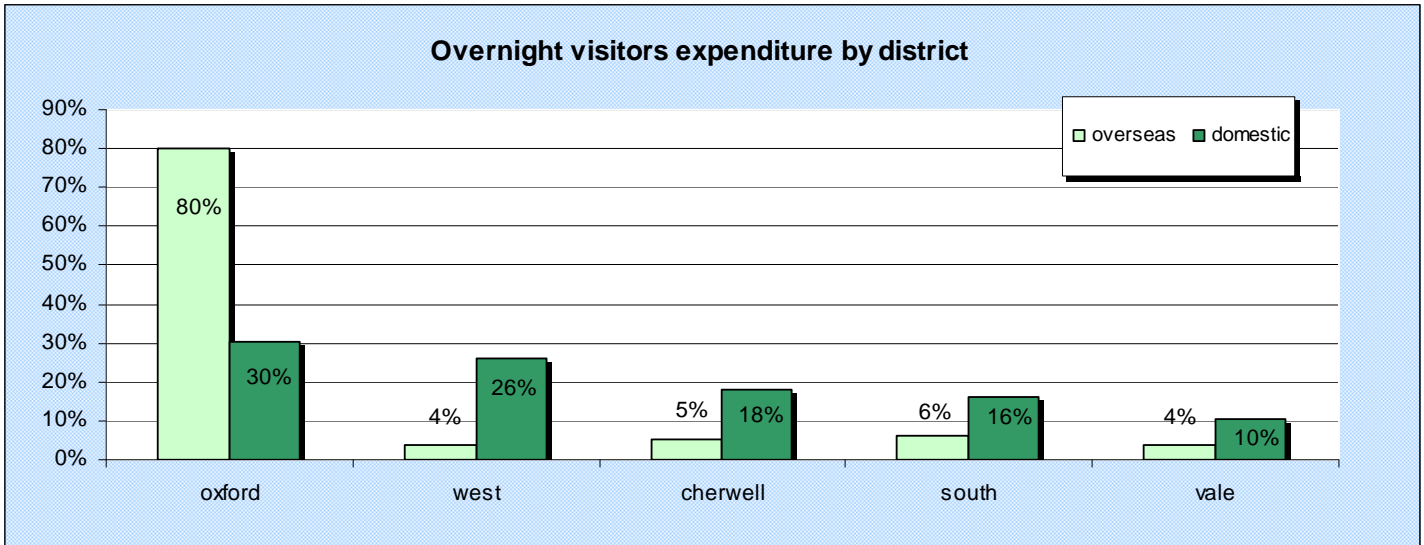
### District breakdown

The proportion of overnight trips made, by district area. In 2007, similarly to 2006, Oxford City received the majority of both domestic and overseas overnight visitors. Overall, comparing 2007 and 2006, there was a slight increase in the number of overseas visits to Oxford, both West and Cherwell saw an increase in domestic overnight visitors.



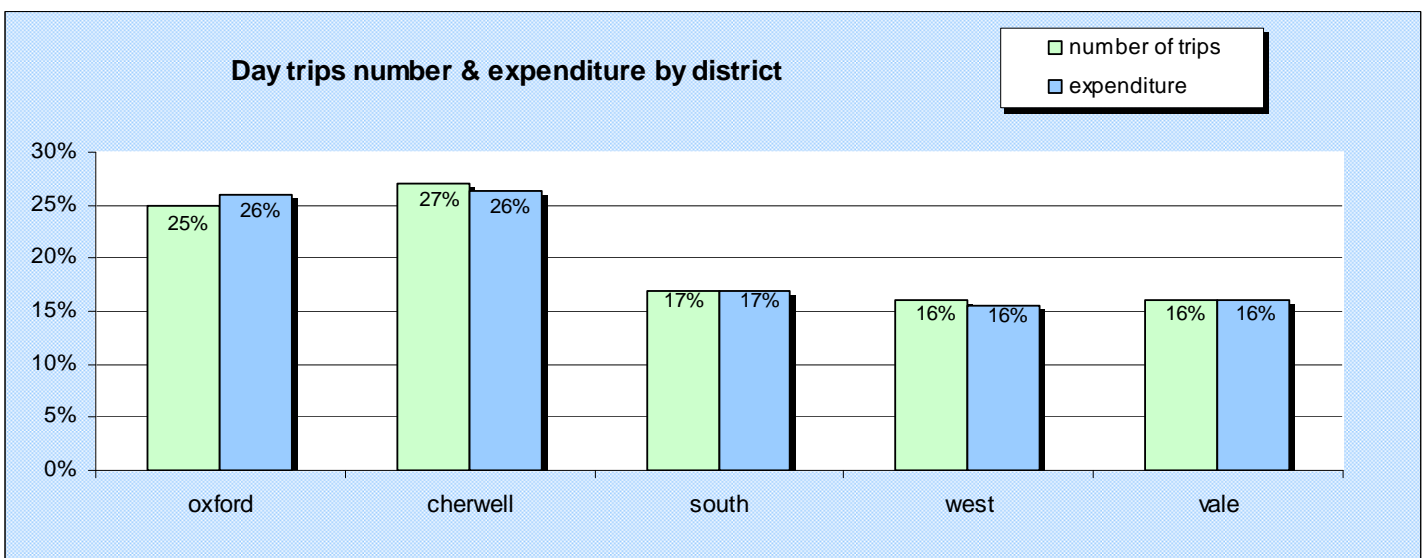
	Number of total overnight trips	Expenditure by overnight visitors
Oxford	121,000	£270,082,000
Cherwell	403,000	£62,793,000
South	378,000	£57,672,000
West	471,000	£82,510,229
Vale	262,000	£38,362,000

Regarding expenditure, as expected relative to the number of visitors, Oxford gained the most revenue from visitors, particularly from overseas visitors who spent £183,018,000, an increase compared to 2006. West Oxfordshire again 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. Similarly to 2006 data, Cherwell once again received the highest number of day trips in 2007, 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 which run a great deal of marketing promotions. In total, 20,917,000 day trippers spent £ 730,723,000 within Oxfordshire. This represents a 1.4% increase in the number of day trippers, and an 1.3% increase in their expenditure when comparing to the year before.

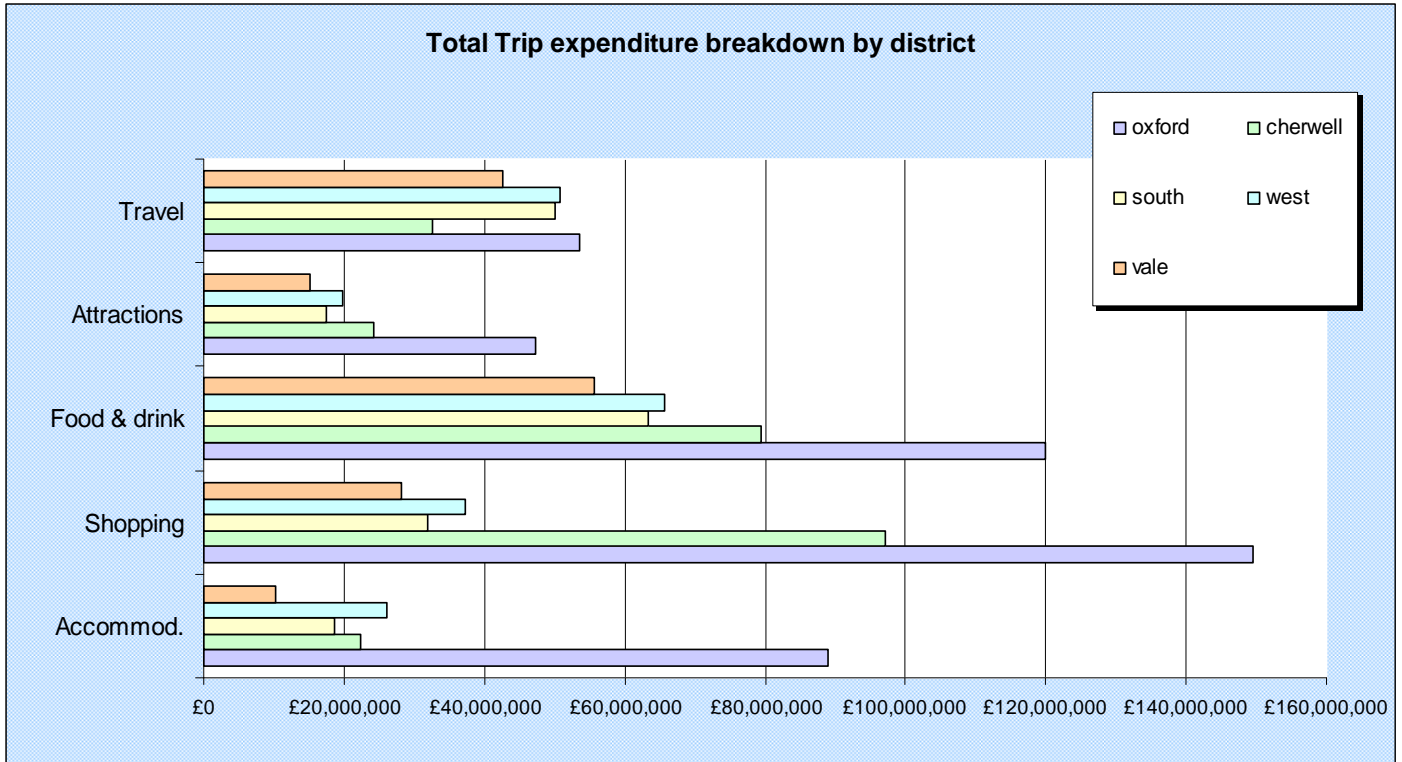
	Number of daytrips	Expenditure by day-trippers
Oxford	5,265,000	£189,540,000
Cherwell	5,645,000	£192,904,001
South	3,548,000	£123,623,000
West	3,209,000	£113,522,000
Vale	3,250,000	£111,134,000



## Breakdown of trip expenditure, by districts

The following 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 2006, the major changes show that there was a decrease in spend on travel, spend on attractions remained similar to 2006. There was a marked increase in spending on food and drink across the districts, with City seeing a large increase. Also the spend related to shopping has increased across all the districts, and again most notably in Oxford.



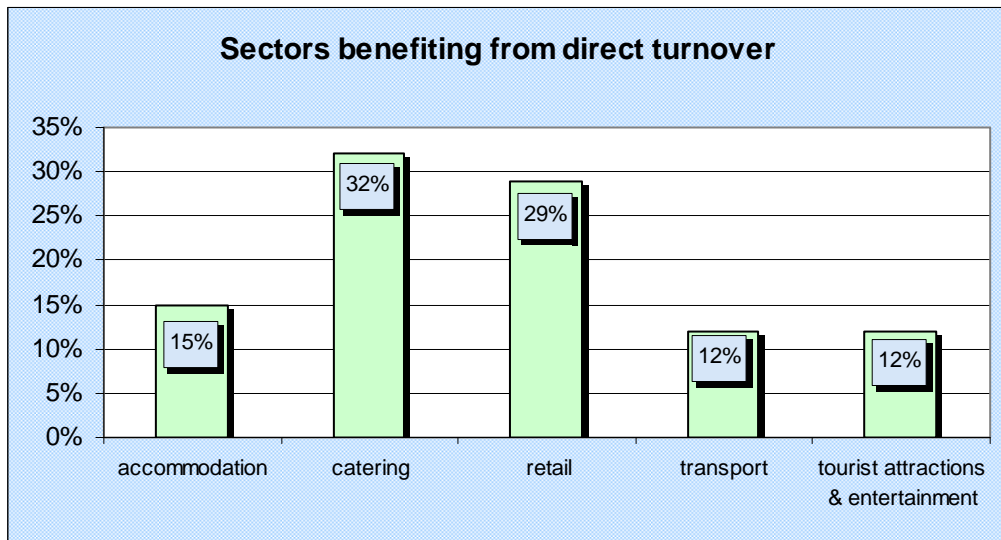
## What economic benefits does tourism have for Oxfordshire businesses?

Across Oxfordshire, £1,215,894,000 (increase of £11,014,000 on 2006) is estimated to have directly benefited businesses (direct turnover). Additionally there was other associated expenditure:

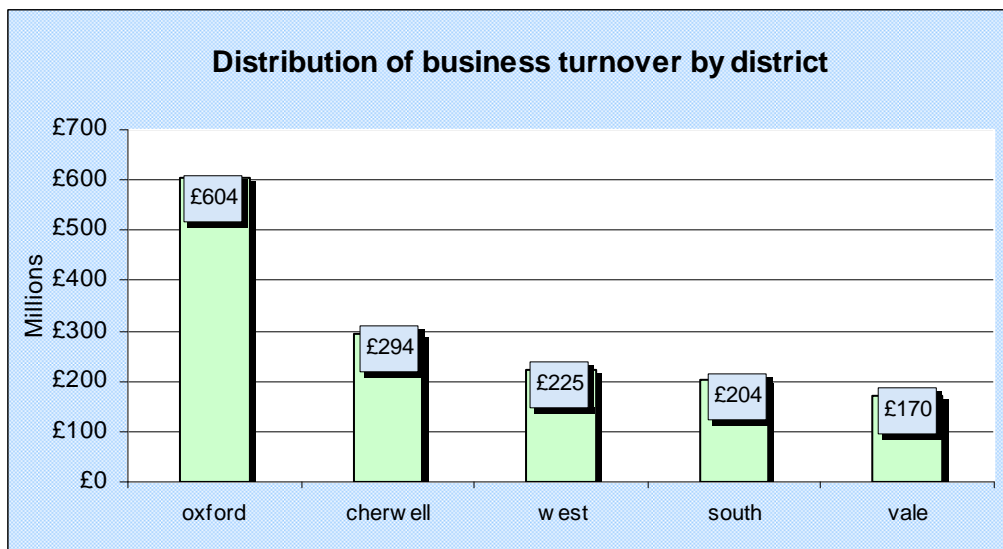
- £1,163,000 was generated through maintenance on second homes
- £2,800,000 was generated through boat related repairs & up-keep
- £61,709,000 was generated through expenditure made by friends & relatives
- £447,691,000 was generated through indirect & induced effects of visitors expenditure

Taking into account the above, the total value of tourism for the economy of Oxfordshire is estimated to amount to **£1.49** in 2007, a growth of 0.6% on 2006.

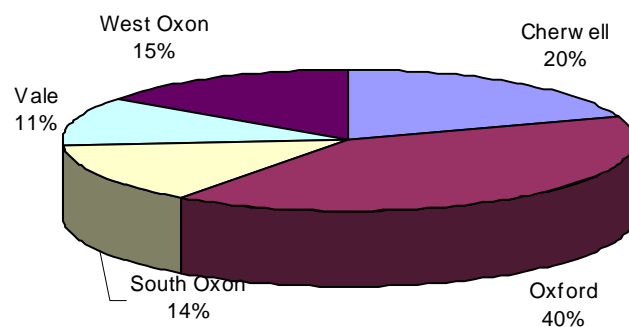
The following chart shows business sectors that benefited from visitor spend. Retail and catering received the majority of spend which is different to 2006 when accommodation and catering received the most income. Overall, the total turnover for all sectors has increased in 2007 (£1,156,275,000) compared to 2006 (£1,138,853,005), and the prior year 2005, (£1,114,202,000).



Of all the district areas in Oxfordshire, Oxford City businesses benefited the most from visitor spend receiving 40% of total business turnover. The other rural districts received a fairly equal level of the remaining turnover with Vale receiving the least. Compared to 2006 figures, Cherwell received 8% more turnover in 2007, West received a 1% increase on turnover whereas Vale, South and Oxford all had decreases in turnover.



**Figure 9: Distribution of Total business turnover**



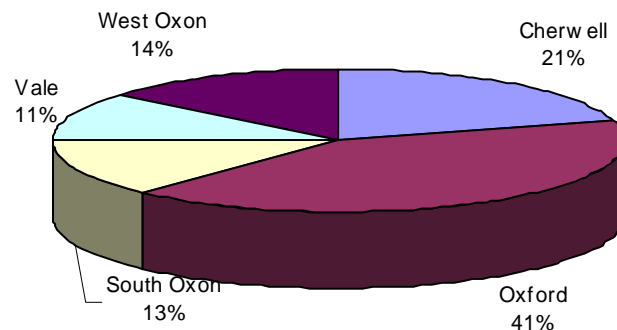
#### Employment supported by total tourism business turnover, by district area

The following table shows the number of FTE (full time equivalent) & actual jobs (including seasonal & part-time) created by income generated by local businesses from tourism in 2007.

	FTE (full time equivalent)	actual jobs (direct/indirect/induced)
Oxford	8,319	11,462
Cherwell	4,166	5,728
West	2,911	4,038
South	2,677	3,873
Vale	2,226	3,045
<b>TOTAL</b>	<b>20,299</b>	<b>27,749</b>

Oxford has the highest proportion of jobs supported by tourism business turnover (41%) with Vale having the least (11%). Taking into account, year on year salary increases and cost of living allowances, most destinations saw a small drop in the number of FTE and Actual jobs supported by tourism spending compared to 2006 apart from in Cherwell and West which had increases of 7% and 1% FTEs.

Figure 10: Distribution of Actual Jobs



The next Economic Model for Oxfordshire using 2008 figures is due December 2009.

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