

The Economic Impact of Tourism on Oxfordshire Estimates for 2007

County and District Results

November 2008

**Prepared by:
Tourism South East
Research Unit
40 Chamberlayne Road
Eastleigh
Hampshire
SO50 5JH**

**TOURISM
SOUTH EAST**

Document control sheet

Client	Oxfordshire County Council
Document Title	The economic impact of tourism in Oxfordshire
Version	1
Status	Draft
Reference	
Author	Parves Khan
Date	24 November 2008

Contact details		
Main point of contact	Telephone number	Email address
Parves Khan	02380 625459	pkhan@tourismse.com

CONTENTS

1.	Introduction	1
1.1	Objective of study	1
1.2	The Cambridge Model	1
1.3	Objective of Economic Modelling	2
1.4	Cambridge Model II	2
2.	Summary of Results	3
2.1	Headline results	3
2.2	Total domestic overnight trips	3
2.3	Total overseas overnight trips	4
2.4	Total day trips	6
2.5	Sector breakdown of trip expenditure	7
2.6	Economic impact estimates	7
2.7	Comparative district results	8

TABLE OF RESULTS

3.1	Overnight trips by purpose	11
3.1.1	Domestic overnight trips by purpose	11
3.1.2	Overseas (inbound) overnight trips by purpose	13
3.1.3	Total overnight trips by purpose	14
3.2	Overnight trips by accommodation	15
3.2.1	Domestic overnight trips by accommodation	15
3.2.2	Overseas overnight trips by accommodation	17
3.2.3	Total overnight trip by accommodation	19
3.3	Tourism day trips	21
3.3.1	Volume of tourism day trips	21
3.3.2	Value of tourism day trips	21
3.4	Breakdown of expenditure associated with trips	22
3.4.1	Breakdown of total trip expenditure by sector	22
3.4.2	Breakdown of overnight domestic trip expenditure	22
3.4.3	Breakdown of overnight overseas trip expenditure	22
3.4.4	Breakdown of tourism day trip expenditure	22
3.5	Additional expenditure associated with tourism activity	23
3.6	Economic Impacts	24
3.6.1	Turnover derived from total trip expenditure	24
3.6.2	FTE employment supported by tourism spending	24
3.6.3	Actual employment supported by tourism spending	24
	Glossary of terms	25

OXFORDSHIRE TOURISM VOLUME & VALUE COMPARATIVE FIGURES 2006-2007

	Cherwell	Oxford	South Oxon	Vale of White	West Oxon	County
Domestic overnight trips 2007	363,000	584,000	338,000	230,000	433,000	1,948,000
Domestic overnight trips 2006	359,000	585,000	347,000	242,000	458,000	1,991,000
% change	1.1%	-0.2%	-2.6%	-5.0%	-5.5%	-2.2%
Overseas overnight trips 2007	40,000	437,000	40,000	32,000	38,000	586,000
Overseas overnight trips 2006	40,000	429,000	39,000	31,000	37,000	576,000
% change	0.0%	1.9%	2.6%	3.2%	2.7%	1.9%
Domestic overnight trip spend 2007	£50,685,000	£87,064,000	£46,277,000	£29,611,000	£73,712,000	£287,349,000
Domestic overnight trip spend 2006	£50,433,000	£88,748,000	£48,670,000	£30,576,000	£73,099,000	£291,526,000
% change	0.5%	-1.9%	-4.9%	-3.2%	0.8%	-1.4%
Domestic overnight ave. spend per trip per person	£139.63	£149.08	£136.91	£128.74	£170.24	£147.51
Overseas overnight trip spend 2007	£12,108,000	£183,018,000	£11,395,000	£8,798,229	£14,754,000	£230,073,229
Overseas overnight trip spend 2006	£12,036,000	£179,216,000	£11,184,000	£8,751,000	£14,282,000	£225,469,000
% change	0.6%	2.1%	1.9%	0.5%	3.3%	2.0%
Overseas overnight ave. expenditure per trip per person	£302.70	£418.81	£284.88	£274.94	£388.26	£391.95
Tourism day visits 2007	5,645,000	5,265,000	3,548,000	3,250,000	3,209,000	20,917,000
Tourism day visits 2006	5,428,000	5,267,000	3,547,065	3,193,271	3,200,988	20,636,324
% change	4.0%	0.0%	0.0%	1.8%	0.3%	1.4%
Tourism day visit spend 2007	£192,904,001	£189,540,000	£123,623,000	£113,522,000	£111,134,000	£730,723,000
Tourism day visit spend 2006	£185,490,000	£189,623,000	£123,590,000	£111,531,000	£110,848,000	£721,082,000
% change	4.0%	0.0%	0.0%	1.8%	0.3%	1.3%

Tourism day visit ave. expenditure per person	£34.17	£36.00	£34.84	£34.93	£34.63	£34.93
Total visitor volume	6,048,000	6,286,000	3,926,000	3,512,000	3,680,000	23,451,000
Total visitor expenditure	£255,697,001	£459,622,000	£181,295,000	£151,931,229	£199,600,000	£1,248,145,229
Total business turnover (with addition of multiplier effect) 2007	£294,416,000	£604,321,000	£204,192,000	£169,636,000	£224,644,000	£1,497,209,000
Total business turnover (with addition of multiplier effect) 2006	£271,833,000	£616,768,000	£205,749,000	£171,907,000	£221,367,000	£1,487,624,000
% change	8%	-2%	-1%	-1%	1%	0.6%
Total Actual Jobs supported 2007	5,728	11,462	3,641	3,046	3,873	27,749
Total Actual Jobs supported 2006	5,382	11,401	3,799	3,089	4,038	27,752
% change	5%	1%	-4%	-1%	-4%	0.1%

1. INTRODUCTION

1.1 OBJECTIVES OF STUDY

This report examines the volume, value and resultant economic impact of tourism on the County of Oxfordshire. Results are presented at District and County level. The study was undertaken by Tourism South East on behalf of Oxfordshire County Council using a widely recognised, industry specific methodology, known as the Cambridge Model. To date, this approach has been widely applied across England and the South East region to produce an indicative outline of the scale of tourism activity on a local area basis.

1.2 THE CAMBRIDGE MODEL

The Cambridge Model is essentially a computer-based spreadsheet model that produces estimates from existing national and local information (e.g. accommodation stocks, inbound trips) of the level of tourism activity within a given local area. The volume of visits is translated into economic terms by estimating the amounts of spending by visitors based on their average spend per trip. In turn, the impact of that spending can be translated to estimate the effects in terms of business turnover and jobs.

The standard measures generated in this Model are: the total amount spent by visitors, the amount of income for local residents and businesses created by this spending, and the number of jobs supported by visitor spending. This report focuses on total revenue raised from visitor spending across Oxfordshire and the estimated number of full-time equivalent and actual jobs sustained by that spending.

As the Model utilises a standard methodology capable of application throughout the UK, it offers the potential for direct comparisons with similar destinations throughout the country.

The basic process of estimation used can be divided into three parts:

- Visitor trips and visitor spending at a regional/county level derived from national survey sources (county/district) ;
- Local supply data on accommodation, attractions and other factors specific to Oxfordshire;
- The use of multipliers derived from business surveys in England to estimate full time equivalent and actual jobs generated by visitor spending in the area.

The sophistication of the economic impact estimates will depend on the availability of detailed reliable local information to supplement national and regional data sources. Where such data is available from local surveys, then local variations can be explicitly included.

In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- United Kingdom Tourism Survey 2007
- International Passenger Survey 2007
- English Leisure Visits Survey 2006
- Census of Population 2001
- Labour Force Survey 2007
- Visits to Attractions Survey 2007

- Annual Survey of Hours and Earnings 2007
- Census of Employment 2001

The following local data sources were gathered:

- Review of accommodation stock in each district (total bed spaces available for year)
- Collection of average bed occupancy data
- Collection of number of visits to attractions data
- Where available, footfall data for retail parks/shopping malls (Bicester Village)

We have extracted inland mooring data from the British Marine Federation Marina and Moorings 2007 Audit.

1.3 OBJECTIVES OF ECONOMIC MODELLING

In applying the Cambridge Model, the main objectives are to provide information on the economic impact of visitors and raise awareness of the profile and local importance of tourism in Oxfordshire.

The Model will be used to:

- Derive estimates of the volume of domestic and overseas overnight visitors visiting the Oxfordshire during the year, by type of accommodation and purpose of visit;
- Derive estimates of the volume of day visitors visiting Oxfordshire during the year, by purpose of visit;
- Derive estimates of the value of tourism spending accruing to Oxfordshire, and the impact of this spending on different sectors of the local economy, in terms of jobs supported.

1.4 CAMBRIDGE MODEL VERSION II

Since the inception of the original Cambridge Model approach, a number of changes have occurred to the model's methodology and the context of operation. Most importantly, autumn 2002 saw the launch of Cambridge Model Version II. This revised approach was developed from work undertaken for the South West Regional Development Agency and includes a number of enhancements. These include:

- Greater use of local data within the standardised model e.g. occupancy data, information on local wage rates
- Enhanced outputs, notably visitor nights by accommodation type, spend by accommodation type, impact of *'additional trip related expenditure'*. The latter refers to expenditure associated with ongoing expenditure on accommodation in the case of visitors overnight at second homes or private boats, or additional spending by non visitors e.g. friends and relatives with whom the visitor is overnight.

2. SUMMARY OF RESULTS

In June and July, there were several periods of extreme rainfall which gave rise to widespread flooding in England with some locations – notably on the river Severn between Tewkesbury and Gloucester, the Thames upstream of Oxford, and South Yorkshire suffering record breaking flood levels. The peak summer months of July and August were also colder than average with September close to average for temperature and above average for sunshine (Source: MetOffice).

Unsurprisingly the poor weather had an impact on domestic holiday trips, with many people putting off their holiday or preferring to take trips closer to home and or taking more day trips instead. Regionally the volume of domestic overnight trips declined by 1% from 18.1 million trips in 2006 to 17.9% million trips in 2007. However, most parts of the region saw an increase in the volume of overseas trips. At regional level the volume of overseas trips increased by 2% (Source: UKTS 2007, IPS 2007).

Recent changes in day trip activity is more difficult to assess as the 2005 England Leisure Visits Survey has is planned to be repeated until 2009. Anecdotal evidence suggests that many destinations saw an increase in day trips as a result of many visitors swapping a short break for day trips. The 4% increase in footfall among the South East's visitor attractions in 2007 lends some support to this suggestion (Source: England Attractions Monitor 2007).

The regional picture is reflected across Oxfordshire. The Model outputs for Oxfordshire are summarised below.

Please note that the Cambridge Model rounds numbers to the nearest 1,000. Trips, nights and expenditure considerably lower than 1,000 will not appear on the tables.

2.1 HEADLINE RESULTS

- 2,535,000 staying trips (domestic & overseas), a drop of 1.2% compared to the previous year;
- £517,422,000 spent by staying visitors on their trip, a marginal increase of 0.1% compared to the previous year;
- 20,917,000 tourism day trips, a increase of 1.4% compared to the previous year;
- £730,723,000 spent by tourism day visitors on their trip, an increase of 1.3% compared to the previous year;
- In total £1,248,147,000 spent by all visitors on their trip;
- In addition, expenditure by friends and relatives on visitors and visitors spend on second homes and boats (i.e. maintenance and repairs) generated a further £59,619,000;
- Of this total expenditure (£1,307,766,004), £1,215,894,000 directly benefits local business in terms of direct business turnover (following adjustments), a 1.4% increase compared to the previous year;
- A further £281,315,000 of business turnover is generated through indirect and induced spending
- In total, tourism activity generated £1,497,209,000 worth of income for local businesses, a small growth of 0.6% compared to the previous year;
- This income supported 20,299 FTE jobs and 27,749 actual jobs, a marginal difference of 0.1% compared to the previous year.

2.2 TOTAL DOMESTIC OVERNIGHT TRIPS – COUNTY RESULTS

- 2.2.1 It is estimated that just fewer than 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%. **See table 1**

- 2.2.2 The majority of domestic trips took place for holiday purposes (58%). VFR and business trips continued to be significant respectively accounting for 22% and 19% of all domestic overnight trips. **See table 1**
- 2.2.3 Around 43% of domestic overnight trips to Oxfordshire involved staying in the homes of friends or relatives. Forty-three percent of trips involved staying in serviced accommodation (i.e. hotel, guest house or B&B). Around a tenth (10.2%) of all domestic overnight trips involved staying in non-serviced accommodation (i.e. self-catering, camping, and static & touring caravan sites). Around 1.4% of trips domestic overnight trips involved staying on boats and 1.7% involved staying in more than one type of accommodation over the duration of the trip. **See table 13**
- 2.2.4 Domestic trips involved a total of 4.9 million bednights, providing an average trip length of length of 2.56 nights. **See tables 3a and 15a**
- 2.2.5 It is estimated that the expenditure associated with domestic overnight trips was somewhere in the region of £487.34 million. Compared to 2006 this represents a decline of 1.4%. **See table 1 & 13**
- 2.2.6 The average expenditure per person for a domestic overnight visitor staying in Oxfordshire in 2007 was £57.63 per night and £147.51 per trip. **See tables 4a/4b and 16a/16b**
- 2.2.7 Fifty-one percent of domestic overnight trip expenditure was made by those on holiday in the County. Over a quarter (26%) of domestic trip expenditure was made by visitors staying in the County for business purposes. A fifth (21%) of domestic trip expenditure was made by those visiting friends and relatives and 2% 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 of trip. **See table 1**
- 2.2.8 Sixty percent of domestic overnight trip expenditure in Oxfordshire came from by those staying in serviced accommodation. Around a quarter (25.4%) of domestic trip expenditure was made by those staying in the home of friends and relatives. **See table 13**
- 2.2.9 Reflecting the generally lower usage levels, 11.3% of domestic trip expenditure was made by those staying in non-serviced accommodation. Those staying on boats and in second homes and in 'Other' or mixed accommodation made up the remaining 3%. **See table 13**

2.3 TOTAL OVERSEAS OVERNIGHT TRIPS – COUNTY RESULTS

- 2.3.1 It is estimated that around 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. **See table 5**
- 2.3.2 For overseas visitors, holidays and VFR trips were equally important in terms of purpose each representing 31% respectively of all purposes. 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. **See table 5**
- 2.3.3 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. **See table 17**

2.3.4 It is estimated around 4,000, overseas overnight trips, representing 1% of the total, involved staying in second homes and the remaining 5% involved staying in more than one type of accommodation over the duration of the trip.

2.3.5 Overseas trips involved a total of 4.27 million bednights, providing an average trip length of 7.28 nights. **See tables 7a and 19a.**

2.3.6 It is estimated that the expenditure associated with overseas overnight trips was somewhere in the region of £230 million. Compared to 2006 this represents an increase of 2%. **See table 5 & 17**

2.3.7 The average expenditure per person for an overseas overnight visitor staying in Oxfordshire in 2007 was £55.86 per night and £391.95 per trip. **See tables 8a/4b and 20a/16b**

2.3.8 Nearly a third of overseas trip expenditure was made by those on holiday (29%). Despite accounting for only 6% of the volume of total overseas trips, 21% of overseas overnight trip expenditure was made by those on language courses in the County. Around 23% of overseas trip expenditure was made by visitors staying in the County for business purposes. VFR represented a fifth of overseas trip expenditure. Seven percent of the total was spent by those visiting for 'other' purposes. **See table 5**

2.3.9 Over third of overseas trip expenditure was made by those staying in serviced accommodation (35%). A quarter (25%) of total overseas trip expenditure was made by those staying in the home of friends and relatives. Reflecting their lower volumes, 8% of overseas trip expenditure was made by those staying in lodgings and 2% by those staying in second homes. **See table 17**

2.3.10 Reflecting the importance of Oxford University in attracting and hosting international conferences and other business/academic related meetings, a fifth of overseas trip expenditure was made by those staying in university campus accommodation. Only 8% of overseas trip expenditure came from those staying in self-catering accommodation and in tents/caravans.

2.4 TOTAL ALL TRIPS (ALL OVERNIGHT AND DAY TRIPS) – COUNTY RESULTS

2.4.1 It is estimated that 2,535,000 visitors both from other parts of the UK and from overseas stayed overnight in Oxfordshire in 2007. Compared to 2006 this represents a decline of 1.2%. **See table 9**

2.4.2 Around 77% of all overnight trips involved British nationals and the remaining 23% involved visitors from overseas.

2.4.3 Around half of total trips involved holiday based trips (52%), followed closely together by VFR (24%) and business based trips (21%). The remaining 32% and 1% of total trips were made for other and study purposes. **See table 9**

2.4.4 The largest proportion (42.2%) of total overnight trips to Oxfordshire involved staying in the homes of friends or relatives. A further 42% of trips involved staying in serviced accommodation. Around 10% of all overnight trips involved staying in non-serviced accommodation. 'Other'/mixed accommodation accounted for around 2.6% of

total trips, lodgings accounted for 0.9% and boats accounted for 1.1% of trips. Less than 1% of all overnight trips involved second homes. **See table 21**

- 2.4.5 Total trips involved approximately 9.25 million bednights, a reduction of 6.6% of total volume compared to 2006.
- 2.4.6 It is estimated that the expenditure associated with total overnight trips was somewhere in the region of £517.4 million. Compared to 2006 this represents a marginal increase of 0.1%. **See table 9 & 21**
- 2.4.7 Forty percent of total overnight trip expenditure was made by those on holiday in the County. Business visitors made up a quarter of total trip expenditure. VFR trips represented a fifth (21%) of all trip expenditure. Four percent of the total was spent by those visiting for 'other' purposes. Trip expenditure associated with language students made up 10% of total trip expenditure though in terms of volume, language students represented only 1% of total trips. **See table 9**
- 2.4.8 Nearly half (49%) of total overnight trip expenditure was made by those staying in serviced accommodation. The accommodation type contributing to the next largest proportion of trip expenditure was the home of friends and relatives. Despite making saving by staying in the home of s friend or relative, around a quarter of trip expenditure was made by these visitors. **See table 21**
- 2.4.9 Reflecting their lower volumes, 3.6% of total trip expenditure was made by those staying in lodgings, another 1% by those staying in second homes, 0.8% by those staying on boats and 1.4% of by staying in mixed accommodation. **See table 21**
- 2.4.10 It is estimated that approximately 20.9 million tourism day trips were made to and within the County for a variety of leisure purposes. Compared to 2006 this represents a growth of 1.4%. Most of this growth comes from increased visits to the large retail destination Bicester Village in Cherwell. **See table 25**
- 2.4.11 Expenditure associated with tourism day trips is estimated to have been somewhere in the region of £730.73 million (ave expenditure of £34.93 per person). Compared to 2006 this represents a growth of 1.3%. This growth in spend is attributed mainly to increased visits to Bicester Village. **See table 26**
- 2.4.12 In total, approximately 23,451,000 tourism trips (11% overnight trips and 89% day trips) were made to and within Oxfordshire in 2007 generating a total of £1,248,145,000 trip expenditure.
- 2.4.13 Additional expenditure is also generated by staying trips through expenditure on accommodation in the case of visitors staying overnight in second homes or private boats. There is also additional spending by non visitors e.g. friends and relatives with whom the visitor is visiting and/or staying overnight with, which will also take place, e.g. taking visitors out for a meal. It is estimated that a further £59.61 million was generated through 'additional trip spend'. **See table 32**

2.5 SECTOR BREAKDOWN OF TRIP EXPENDITURE

- 2.5.1 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. **See table 27**

- 2.5.2 The pattern between overseas and domestic trip expenditure on food and drink is similar with both spending around 20% of trip expenditure on purchasing food and beverages. **See table 27**
- 2.5.3 Around 18% of total trip expenditure went towards travel and transport costs, including petrol, parking charges and fares.
- 2.5.4 For tourism day trips, the largest proportion of trip expenditure went on the purchase of food and drink (38%) which was followed by shopping (32%). Twenty percent of total trip expenditure went towards travel costs and a further 10% went towards visitor attractions and other entertainment. **See table 27**

2.6 ECONOMIC IMPACT ESTIMATES

- 2.6.1 The model provides an estimate for the magnitude of additional business turnover generated through the impact of visitor related expenditure in Oxfordshire. Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. Furthermore, it is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.
- 2.6.2 Once adjustments are made to the £1.24 billion spent by visitors on their trip, it is estimated that £1.15 billion directly benefited businesses in Oxfordshire through visitor's spending money on goods and services purchased from businesses located in Oxfordshire. **See table 33**
- 2.6.3 With staying trip, tourism day trip and additional trip expenditure (the additional £59.61 million trip-related spend) combined, an estimated £1,307,766,000 was generated by tourism activity. Of this, £1,215,894,000 is estimated to have directly benefited businesses in Oxfordshire. **See table 33**
- 2.6.4 In addition to direct turnover, indirect and induced effects of visitor expenditure through multiplier effects generated a further £281,315,000 worth of income for local businesses. **See table 35**
- 2.6.3 Drawing together direct and indirect/induced business turnover, the total value of visitor expenditure to the Oxfordshire economy in 2007 is estimated to be in the region of £1.49 billion, a small growth of 0.6% since 2006. **See table 35**
- 2.6.4 It is estimated that around 20,299 FTE Jobs were supported by total business turnover in 2007, a small growth of 0.5% since 2006. With the addition of part-time and seasonal jobs, it is estimated that around 27,749 Actual Jobs were supported across the County, a marginal growth of 0.1% since 2006. **See table 37 & 38**

2.7 COMPARATIVE DISTRICT RESULTS

2.7.1 As with 2006, results at District level sharply reveal significant differences in the distribution of domestic and overseas trips at destination level between Oxford City and the rest of Oxfordshire. Across the County, Cherwell, West Oxfordshire, South Oxfordshire, and the Vale of White Horse take up the largest share of domestic overnight trips. Compared to the other four Districts, the volume of the domestic market is much smaller in Oxford, where it accounted for 57% of total overnight trips.

	% of domestic staying trips	% of overseas staying trips
Cherwell District	90%	10%
Oxford City	57%	43%
South Oxfordshire	89%	11%
Vale of White Horse	88%	12%
West Oxfordshire	92%	8%

2.7.6 The distribution of domestic staying trips across the County indicates that the largest proportion at 30% was spent in Oxford. A fifth of all domestic overnight trips was spent in West Oxfordshire (22%). Cherwell accounted for 19% of all domestic overnight trips. Seventeen percent of domestic overnight trips was spent in South Oxfordshire and the remaining 12% was spent in the Vale of White Horse. A similar pattern is shown in the distribution of domestic bednights.

Figure 1: Distribution of Domestic trips

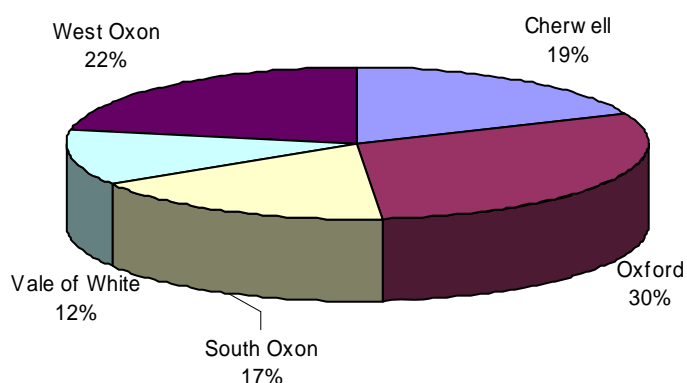
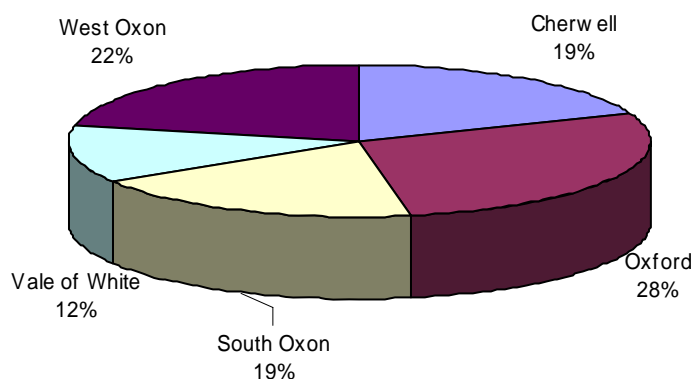


Figure 2: Distribution of Domestic trip nights



2.7.7 The distribution of overseas staying trips across the County indicates that the vast majority at 75% went to Oxford. South Oxfordshire and Cherwell received 7% each of the share of overseas staying trips. West Oxfordshire accounted for 6%. The remaining 5% of overseas staying trips went to The Vale of White Horse. A similar pattern is shown in the distribution of overseas bednights.

Figure 3: Distribution of Overseas trip

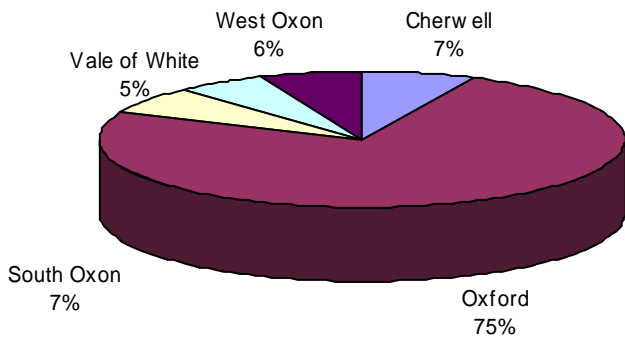
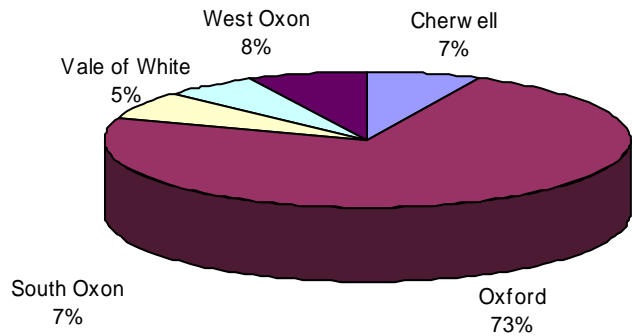


Figure 4: Distribution of Overseas trip nights



2.7.8 A third of all domestic overnight trip expenditure across the county was gained by Oxford City (30%). The District gaining the second largest share of domestic overnight trip expenditure was West Oxfordshire (26%) followed by Cherwell (18%) and South Oxfordshire a(16%), and the Vale of White Horse at 10%.

2.7.9 With regard to overseas overnight trip expenditure across the County, reflecting the high volume of overseas trips, Oxford City took the lion share at 80%.

Figure 5: Distribution of Domestic trip expenditure

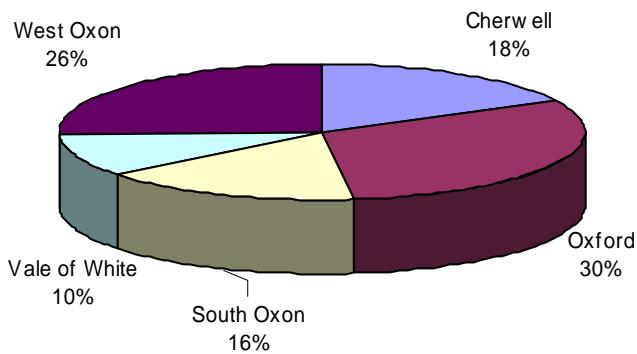
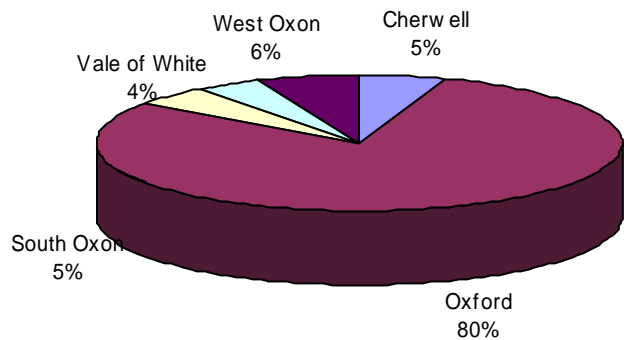


Figure 6: Distribution of Overseas trip expenditure



2.7.10 Of the 20.9 million tourism day trips to and within the County, the largest proportion of trips across the County involved trips to Cherwell and Oxford (27% and 25% each respectively). South Oxfordshire took 17% of the County share and the Vale and West Oxfordshire each took 15% and 15% of the County share of tourism day trips respectively.

Figure 7: Distribution of Tourism day trips

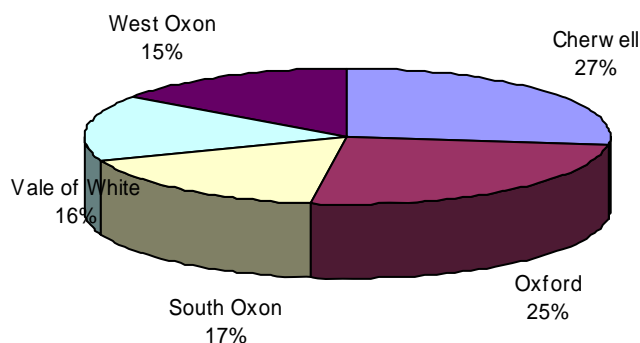
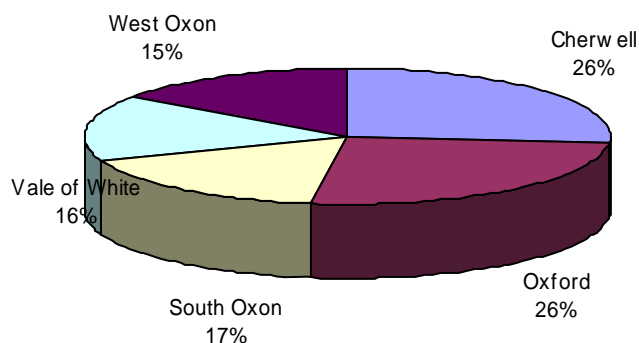


Figure 8: Distribution of Tourism day trip expenditure



2.7.11 Of the £730.7 million visitor expenditure associated with tourism day trips to and within the County, the largest proportion of expenditure across the County involved trips to Cherwell and Oxford (26% each of County share respectively). South Oxfordshire took 17% of the County share, the Vale took 16% and West Oxfordshire took 15% of the County share of tourism day trip expenditure.

2.7.12 The distribution of business turnover across the County indicates that 40% of total turnover was received by businesses in Oxford. The distribution of total turnover was lower for the other four Districts. Businesses in Cherwell received 20% of the total turnover. Businesses in West received 15% and South Oxfordshire received 14% of turnover. The Vale of White Horse received 11% of total turnover.

Figure 9: Distribution of Total business turnover

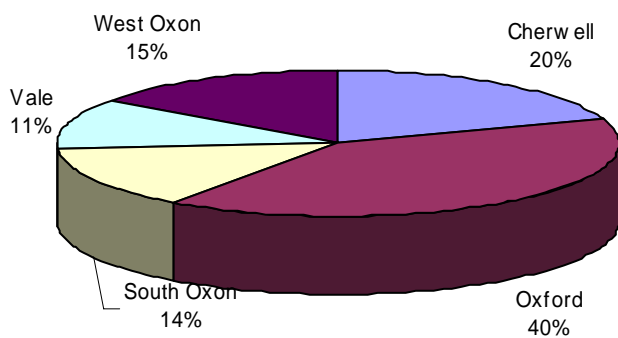
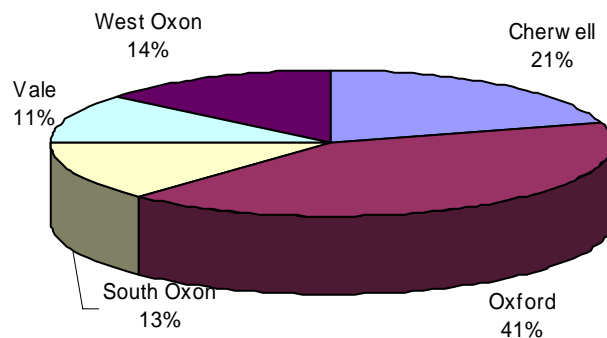


Figure 10: Distribution of Actual Jobs



2.7.18 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.

2.7.19 Reflecting it's significantly larger tourism market, the largest proportion of Actual Jobs created and sustained in the County was in Oxford (41%). The District supporting the next largest volume of Actual jobs was Cherwell (21%). West Oxfordshire supported 14% of Actual Jobs and South Oxfordshire supported 13% of Actual Jobs. The Vale of White Horse supported 11% of Actual Jobs.

3. Tables of Results

3.1 OVERNIGHT TRIPS BY PURPOSE

3.1.1 Domestic overnight trips by purpose¹

	No. of domestic trips		No. of domestic nights		Domestic trip expenditure	
Holiday	1,128,002	58%	3,108,000	62%	146,320,000	51%
Business	374,001	19%	829,000	17%	76,019,000	26%
VFR	423,001	22%	1,019,000	20%	59,922,000	21%
Other/mixed	22,000	1%	30,000	1%	5,085,000	2%
Total 2007	1,948,000		4,986,000		287,349,000	
Total 2006	1,991,000		5,378,000		£291,526,000	
% change	-2%		-7%		-1%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	135,000	37%	374,000	64%	170,000	50%	115,000	50%	334,000	77%
B'ness	128,000	35%	109,000	19%	74,000	22%	31,000	13%	32,000	7%
VFR	95,000	26%	95,000	16%	89,000	26%	80,000	35%	64,000	15%
Other/mixed	5,000	1%	5,000	1%	5,000	1%	4,000	2%	3,000	1%
Total 2007	363,000		584,000		338,000		230,000		433,000	
Total 2006	359,000		585,000		347,000		242,000		458,000	
% change	1.1%		-0.2%		-2.6%		-5.0%		-5.5%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	399,000	42%	980,000	69%	519,000	56%	342,000	55%	868,000	81%
B'ness	295,000	31%	223,000	16%	175,000	19%	72,000	12%	64,000	6%
VFR	240,000	26%	210,000	15%	230,000	25%	199,000	32%	140,000	13%
Other/mixed	7,000	1%	6,000	0%	7,000	1%	6,000	1%	4,000	0%
Total 2007	941,000		1,420,000		930,000		619,000		1,076,000	
Total 2006	971,000		1,541,000		999,000		681,000		1,186,000	
% change	-3.1%		-7.9%		-6.9%		-9.1%		-9.3%	

¹ For the purpose of this study, purpose of visit is divided into the following categories:

- *Holiday trips*
- *Business trips (including meeting and conferences)*
- *Visits to friends and relatives (VFR). Visits to friends and relatives are for social and personal reasons, and do not include holiday trips staying with friends and relatives*
- *Language study (language school courses for overseas visitors)*
- *Other purposes including education and training, social or sporting events, house hunting, weddings and funerals, or when visitors have multiple reasons for visiting, or where no particular purpose is dominant, e.g. business and leisure.*

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	2.96	2.62	3.05	2.97	2.60	2.76
B'ness	2.30	2.05	2.36	2.32	2.00	2.22
VFR	2.53	2.21	2.58	2.49	2.19	2.41
Other/mixed	1.40	1.20	1.40	1.50	1.33	1.36
Total 2007	2.59	2.43	2.75	2.69	2.48	2.56

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	£14,336,000	28%	£47,698,000	55%	£19,202,000	41%	£12,655,000	43%	£52,429,000	71%
B'ness	£23,386,000	46%	£23,960,000	28%	£14,273,000	31%	£5,838,000	20%	£8,562,000	12%
VFR	£11,949,000	24%	£14,201,000	16%	£11,800,000	25%	£10,247,000	35%	£11,725,000	16%
Other/mixed	£1,014,000	2%	£1,205,000	1%	£1,001,000	2%	£870,000	3%	£995,000	1%
Total 2007	£50,685,000		£87,064,000		£46,277,000		£29,611,000		£73,712,000	
Total 2006	£50,433,000		£88,748,000		£48,670,000		£30,576,000		£73,099,000	
% change	0.5%		-1.9%		-4.9%		-3.2%		0.8%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£35.93	£48.67	£37.00	£37.00	£60.40	£47.08
B'ness	£79.27	£107.44	£81.56	£81.08	£133.78	£91.70
VFR	£49.79	£67.62	£51.30	£51.49	£83.75	£58.80
Other/mixed	£144.86	£200.83	£143.00	£145.00	£248.75	£169.50
Total 2007	£53.86	£61.31	£49.76	£47.84	£68.51	£57.63

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£106.19	£127.53	£112.95	£110.04	£156.97	£129.72
B'ness	£182.70	£219.82	£192.88	£188.32	£267.56	£203.26
VFR	£125.78	£149.48	£132.58	£128.09	£183.20	£141.66
Other/mixed	£202.80	£241.00	£200.20	£217.50	£331.67	£231.14
Total 2007	£139.63	£149.08	£136.91	£128.74	£170.24	£147.51

3.1.2 Overseas (inbound) overnight trips by purpose

	Number of overseas trips		Number of overseas nights		Overseas trip expenditure	
Holiday	185,400	31%	952,081	22%	65,859,051	29%
Business	158,280	27%	667,430	16%	51,932,291	23%
VFR	180,250	31%	1,379,852	32%	46,334,381	20%
Other/mixed	31,040	5%	544,341	13%	16,425,321	7%
Study	32,590	6%	725,460	17%	49,400,880	21%
Total 2007	587,000		4,272,000		230,073,000	
Total 2006	576,000		4,537,000		225,469,000	
% change	1.9%		-5.8%		2.0%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	4,000	10%	148,580	34%	8,400	21%	15,680	49%	8,740	23%
B'ness	9,200	23%	139,840	32%	6,000	15%	960	3%	2,280	6%
VFR	21,200	53%	100,510	23%	21,600	54%	13,760	43%	23,180	61%
Other/mixed	4,000	10%	17,480	4%	3,200	8%	2,560	8%	3,800	10%
Study	2,000	5%	30,590	7%	0	0%	0	0%	0	0%
Total 2007	40,000		437,000		40,000		32,000		38,000	
Total 2006	40,000		429,000		39,000		31,000		37,000	
% change	0.0%		1.9%		2.6%		3.2%		2.7%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	20,860	7%	752,400	24%	36,920	13%	32,760	14%	109,140	34%
B'ness	32,780	11%	595,650	19%	25,560	9%	7,020	3%	6,420	2%
VFR	149,000	50%	783,750	25%	159,040	56%	140,400	60%	147,660	46%
Other/mixed	59,600	20%	313,500	10%	59,640	21%	53,820	23%	57,780	18%
Study	35,760	12%	689,700	22%	0	0%	0	0%	0	0%
Total 2007	298,000		3,135,000		284,000		234,000		321,000	
Total 2006	321,000		3,319,000		298,000		245,000		354,000	
% change	-7.2%		-5.5%		-4.7%		-4.5%		-9.3%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	5.22	5.06	4.40	2.09	12.49	5.14
B'ness	3.56	4.26	4.26	7.31	2.82	4.22
VFR	7.03	7.80	7.36	10.20	6.37	7.66
Other/mixed	14.90	17.93	18.64	21.02	15.21	17.54
Study	17.88	22.55	0.00	0.00	0.00	22.26
Total 2007	7.45	7.17	7.10	7.31	8.45	7.28

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	£847,560	7%	£54,905,400	30%	£2,620,850	23%	£1,583,640	18%	£5,901,600	40%
B'ness	£3,027,000	25%	£45,754,500	25%	£1,709,250	15%	£703,840	8%	£737,700	5%
VFR	£4,237,800	35%	£27,452,700	15%	£4,785,900	42%	£4,399,000	50%	£5,458,980	37%
Other/mixed	£2,058,360	17%	£7,320,720	4%	£2,279,000	20%	£2,111,520	24%	£2,655,720	18%
Study	£1,816,200	15%	£47,584,680	26%	£0	0%	£0	0%	£0	0%
Total 2007	£12,108,000		£183,018,000		£11,395,000		£8,798,000		£14,754,000	
Total 2006	£12,036,000		£179,216,000		£11,184,000		£8,751,000		£14,282,000	
% change	0.6%		2.1%		1.9%		0.5%		3.3%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£40.63	£72.97	£70.99	£48.34	£54.07	£69.17
B'ness	£92.34	£76.81	£66.87	£100.26	£114.91	£77.81
VFR	£28.44	£35.03	£30.09	£31.33	£36.97	£33.58
Other/mixed	£34.54	£23.35	£38.21	£39.23	£45.96	£30.17
Study	£50.79	£68.99	£0.00	£0.00	£0.00	£68.10
Total 2007	£40.63	£58.38	£40.12	£37.60	£45.96	£53.86

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£211.89	£369.53	£312.01	£101.00	£675.24	£355.23
B'ness	£329.02	£327.19	£284.88	£733.17	£323.55	£328.10
VFR	£199.90	£273.13	£221.57	£319.69	£235.50	£257.06
Other/mixed	£514.59	£418.81	£712.19	£824.81	£698.87	£529.17
Study	£908.10	£1,555.56	£0.00	£0.00	£0.00	£1,515.83
Total 2007	£302.70	£418.81	£284.88	£274.94	£388.26	£391.95

3.1.3 Total overnight trips by purpose

	Number of total trips		Number of total nights		Total trip expenditure	
Holiday	1,313,400	52%	4,060,080	44%	£212,179,050	40%
Business	532,280	21%	1,496,430	16%	£127,951,290	25%
VFR	603,250	24%	2,398,850	26%	£106,256,380	21%
Other/mixed	53,040	2%	574,340	6%	£21,510,320	4%
Study	32,590	1%	725,460	8%	349,400,880	10%
Total 2007	2,535,000		9,258,000		£517,422,000	
Total 2006	2,567,000		9,913,000		£516,995,000	
% change	-1.2%		-6.6%		0.1%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	139,000	34%	522,580	51%	178,400	47%	130,680	50%	342,740	73%
B'ness	137,200	34%	248,840	24%	80,000	21%	31,960	12%	34,280	7%
VFR	116,200	29%	195,510	19%	110,600	29%	93,760	36%	87,180	19%
Other/mixed	9,000	2%	22,480	2%	8,200	2%	6,560	3%	6,800	1%
Study	2,000	0%	30,590	3%	0	0%	0	0%	0	0%
Total 2007	403,000		1,021,000		378,000		262,000		471,000	
Total 2006	399,000		1,014,000		386,000		273,000		495,000	
% change	1.0%		0.7%		-2.1%		-4.0%		-4.8%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	419,860	34%	1,732,400	38%	555,920	46%	374,760	44%	977,140	70%
B'ness	327,780	26%	818,650	18%	200,560	17%	79,020	9%	70,420	5%
VFR	389,000	31%	993,750	22%	389,040	32%	339,400	40%	287,660	21%
Other/mixed	66,600	5%	319,500	7%	66,640	5%	59,820	7%	61,780	4%
Study	35,760	3%	689,700	15%	0	0%	0	0%	0	0%
Total 2007	1,239,000		4,555,000		1,214,000		853,000		1,397,000	
Total 2006	1,292,000		4,860,000		1,297,000		924,000		1,540,000	
% change	-4.1%		-6.3%		-6.4%		-7.7%		-9.3%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	3.02	3.32	3.12	2.87	2.85	3.09
B'ness	2.39	3.29	2.51	2.47	2.05	2.81
VFR	3.35	5.08	3.52	3.62	3.30	3.98
Other/mixed	7.40	14.21	8.13	9.12	9.09	10.83
Study	17.88	22.55	0.00	0.00	0.00	22.26
Total 2007	3.07	4.46	3.21	3.26	2.97	3.65

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
H'day	£15,183,560	24%	£102,603,400	38%	£21,822,850	38%	£14,238,640	37%	£58,330,600	66%
B'ness	£26,413,000	42%	£69,714,500	26%	£15,982,250	28%	£6,541,840	17%	£9,299,700	11%
VFR	£16,186,800	26%	£41,653,700	15%	£16,585,900	29%	£14,646,000	38%	£17,183,980	19%
Other/mixed	£3,072,360	5%	£8,525,720	3%	£3,280,000	6%	£2,981,520	8%	£3,650,720	4%
Study	£1,816,200	3%	£47,584,680	18%	£0	0%	£0	0%	£0	0%
Total 2007	£62,793,000		£270,082,000		£57,672,000		£38,409,000		£88,466,000	
Total 2006	£62,469,000		£267,964,000		£59,854,000		£39,327,000		£87,381,000	
% change	0.5%		0.8%		-3.6%		-2.3%		1.2%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£36.16	£59.23	£39.26	£37.99	£59.70	£52.26
B'ness	£80.58	£85.16	£79.69	£82.79	£132.06	£85.50
VFR	£41.61	£41.92	£42.63	£43.15	£59.74	£44.29
Other/mixed	£46.13	£26.68	£49.22	£49.84	£59.09	£37.45
Study	£50.79	£68.99	£0.00	£0.00	£0.00	£68.10
Total 2007	£50.68	£59.29	£47.51	£45.03	£63.33	£55.89

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
H'day	£109.23	£196.34	£122.33	£108.96	£170.19	£161.55
B'ness	£192.51	£280.16	£199.78	£204.69	£271.29	£240.38
VFR	£139.30	£213.05	£149.96	£156.21	£197.11	£176.14
Other/mixed	£341.37	£379.26	£400.00	£454.50	£536.87	£405.55
Study	£908.10	£1,555.56	£0.00	£0.00	£0.00	£1,515.83
Total 2007	£155.81	£264.53	£152.57	£146.60	£187.83	£204.11

3.2 Overnight trips by accommodation

3.2.1 Domestic overnight trips by accommodation

	Number of domestic trips		Number of domestic nights		Domestic trip expenditure	
Serviced	833,000	42.7%	1,535,000	30.8%	£173,395,002	60.3%
Self catering	26,000	1.3%	148,000	3.0%	£10,152,000	3.5%
Touring/tents	67,000	3.4%	283,000	5.7%	£8,886,000	3.1%
Static /holiday	13,000	0.7%	55,000	1.1%	£4,607,000	1.6%
Group/campus	94,000	4.8%	223,000	4.5%	£8,917,000	3.1%
Second homes	4,000	0.2%	11,000	0.2%	£438,000	0.2%
Boat moorings ²	28,000	1.4%	146,000	2.9%	£4,088,000	1.4%
Other/mixed ³	34,000	1.7%	57,000	1.1%	£3,940,000	1.4%
FR home	850,000	43.6%	2,523,000	50.7%	£72,925,001	25.4%
Total 2007	1,948,000		4,986,000		£287,349,000	
Total 2006	1,991,000		5,378,000		£291,526,000	
% change	-2.2%		-7.3%		-1.4%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	141,000	38.8%	277,000	47.4%	113,000	33.4%	56,000	24.3%	246,000	56.8%
Self catering	3,000	0.8%	4,000	0.7%	4,000	1.2%	2,000	0.9%	13,000	3.0%
Touring/tents	16,000	4.4%	5,000	0.9%	18,000	5.3%	1,000	0.4%	27,000	6.2%
Static /holiday	2,000	0.6%	1,000	0.2%	3,000	0.9%	0	0.0%	7,000	1.6%
Group/campus	0	0.0%	82,000	14.0%	1,000	0.3%	3,000	1.3%	8,000	1.8%
Second homes	1,000	0.3%	1,000	0.2%	1,000	0.3%	0	0.0%	1,000	0.2%
Boat moorings	0	0.0%	16,000	2.7%	12,000	3.6%	0	0.0%	0	0.0%
Other/mixed	8,000	2.2%	7,000	1.2%	7,000	2.1%	7,000	3.0%	5,000	1.2%
FR home	192,000	52.9%	191,000	32.7%	179,000	53.0%	160,000	69.6%	128,000	29.6%
Total 2007	363,000		584,000		338,000		230,000		433,000	
Total 2006	359,000		585,000		347,000		242,000		458,000	
% change	1.1%		-0.2%		-2.6%		-5.0%		-5.5%	

NB: Please note that trips by accommodation type which involve fewer than 500 trips per year are not presented.

² Information on boat use is not available for overseas tourists.

³ Trips which involve staying in more than one type of accommodation over the duration of the trip. For overseas trips these also include nights spent in transit, in lorry cabs and other temporary accommodation.

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	260,000	27.6%	510,000	35.9%	208,000	22.4%	104,000	16.8%	453,000	42.1%
Self catering	18,000	1.9%	25,000	1.8%	21,000	2.3%	13,000	2.1%	71,000	6.6%
Touring/tents	67,000	7.1%	22,000	1.5%	76,000	8.2%	6,000	1.0%	112,000	10.4%
Static /holiday	10,000	1.1%	4,000	0.3%	12,000	1.3%	1,000	0.2%	28,000	2.6%
Group/campus	0	0.0%	195,000	13.7%	3,000	0.3%	7,000	1.1%	18,000	1.7%
Second homes	2,000	0.2%	2,000	0.1%	3,000	0.3%	1,000	0.2%	3,000	0.3%
Boat moorings	0	0.0%	83,000	5.8%	63,000	6.8%	0	0.0%	0	0.0%
Other/mixed	13,000	1.4%	12,000	0.8%	12,000	1.3%	11,000	1.8%	9,000	0.8%
FR home	570,000	60.6%	566,000	39.9%	532,000	57.2%	475,000	76.7%	380,000	35.3%
Total 2007	941,000		1,420,000		930,000		619,000		1,076,000	
Total 2006	971,000		1,541,000		999,000		681,000		1,186,000	
% change	-3.1%		-7.9%		-6.9%		-9.1%		-9.3%	

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	1.84	1.84	1.84	1.86	1.84	1.84
Self catering	6.00	6.25	5.25	6.50	5.46	5.69
Touring/tents	4.19	4.40	4.22	6.00	4.15	4.22
Static /holiday	5.00	4.00	4.00	0.00	4.00	4.23
Group/campus	0.00	2.38	3.00	2.33	2.25	2.37
Second homes	2.00	2.00	3.00	0.00	3.00	2.75
Boat moorings	0.00	5.19	5.25	0.00	0.00	5.21
Other/mixed	1.63	1.71	1.71	1.57	1.80	1.68
FR home	2.97	2.96	2.97	2.97	2.97	2.97
Total 2007	2.59	2.43	2.75	2.69	2.48	2.56

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented and therefore we cannot show average duration of these trips

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	£29,050,000	57.3%	£56,938,000	65.4%	£23,240,000	50.2%	£13,620,000	46.0%	£50,547,000	68.6%
Self catering	£1,236,000	2.4%	£1,692,000	1.9%	£1,464,000	3.2%	£879,000	3.0%	£4,881,000	6.6%
Touring/tents	£2,102,000	4.1%	£701,000	0.8%	£2,383,000	5.1%	£196,000	0.7%	£3,504,000	4.8%
Static /holiday	£836,000	1.6%	£350,000	0.4%	£999,000	2.2%	£96,000	0.3%	£2,326,000	3.2%
Group/campus	£0	0.0%	£7,789,000	8.9%	£113,000	0.2%	£283,000	1.0%	£732,000	1.0%
Second home	£76,000	0.1%	£80,000	0.1%	£100,000	0.2%	£50,000	0.2%	£132,000	0.2%
Boat moorings	£0	0.0%	£2,336,000	2.7%	£1,752,000	3.8%	£0	0.0%	£0	0.0%
Other/mixed	£910,000	1.8%	£814,000	0.9%	£850,000	1.8%	£759,000	2.6%	£607,000	0.8%
FR home	£16,474,000	32.5%	£16,364,000	18.8%	£15,376,000	33.2%	£13,728,000	46.4%	£10,983,000	14.9%
Total 2007	£50,685,000		£87,064,000		£46,277,000		£29,611,000		£73,712,000	
Total 2006	£50,433,000		£88,748,000		£48,670,000		£30,576,000		£73,099,000	
% change	0.5%		-1.9%		-4.9%		-3.2%		0.8%	

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented and therefore we cannot show average expenditure of these trips

Volume, Value and Economic Impact of Tourism on Oxfordshire

Table 16a: Domestic trip ave. spend per person per night by accommodation stayed at						
	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£111.73	£111.64	£111.73	£130.96	£111.58	£112.96
Self catering	£68.67	£67.68	£69.71	£67.62	£68.75	£68.59
Touring/tents	£31.37	£31.86	£31.36	£32.67	£31.29	£31.40
Static /holiday	£83.60	£87.50	£83.25	£96.00	£83.07	£83.76
Group/campus	£0.00	£39.94	£37.67	£40.43	£40.67	£39.99
Second homes	£38.00	£40.00	£33.33	£50.00	£44.00	£39.82
Boat moorings	£0.00	£28.14	£27.81	£0.00	£0.00	£28.00
Other/mixed	£70.00	£67.83	£70.83	£69.00	£67.44	£69.12
FR home	£28.90	£28.91	£28.90	£28.90	£28.90	£28.90
Total 2007	£53.86	£61.31	£49.76	£47.84	£68.51	£57.63

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented and therefore we cannot show average expenditure of these trips

Table 16b: Domestic trip ave. spend per person per trip by accommodation stayed at						
	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£206.03	£205.55	£205.66	£243.21	£205.48	£208.16
Self catering	£412.00	£423.00	£366.00	£439.50	£375.46	£390.46
Touring/tents	£131.38	£140.20	£132.39	£196.00	£129.78	£132.63
Static /holiday	£418.00	£350.00	£333.00	£0.00	£332.29	£354.38
Group/campus	£0.00	£94.99	£113.00	£94.33	£91.50	£94.86
Second homes	£76.00	£80.00	£100.00	£0.00	£132.00	£109.50
Boat moorings	£0.00	£146.00	£146.00	£0.00	£0.00	£146.00
Other/mixed	£113.75	£116.29	£121.43	£108.43	£121.40	£115.88
FR home	£85.80	£85.68	£85.90	£85.80	£85.80	£85.79
Total 2007	£139.63	£149.08	£136.91	£128.74	£170.24	£147.51

3.2.2 Overseas overnight trips by accommodation

	Number of overseas trips		Number of overseas nights		Overseas trip expenditure	
Serviced	232,000	37%	830,000	17%	£81,427,000	35%
Self catering	13,000	2%	477,000	10%	£15,545,000	7%
Touring/tents	10,000	3%	50,000	3%	£1,695,000	1%
Static /holiday	0	0%	0	0%	£47,000	0%
Group/campus	55,000	10%	670,000	18%	£47,786,000	21%
Paying guest	22,000	3%	429,000	7%	£18,517,000	8%
Second homes	4,000	1%	73,000	2%	£4,520,000	2%
Other/mixed	32,000	5%	144,000	1%	£3,275,000	1%
FR home	219,000	39%	1,598,000	40%	£57,263,000	25%
Total 2007	587,000		4,272,000		£230,073,000	
Total 2006	576,000		4,537,000		£225,469,000	
% Change	1.9%		-5.8%		2.0%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	5,000	12.5%	211,000	48.3%	5,000	12.5%	3,000	9.4%	8,000	21.1%
Self catering	1,000	2.5%	9,000	2.1%	1,000	2.5%	0	0.0%	2,000	5.3%
Touring/tents	1,000	2.5%	6,000	1.4%	1,000	2.5%	0	0.0%	2,000	5.3%
Static /holiday	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Group/campus	0	0.0%	52,000	11.9%	0	0.0%	1,000	3.1%	2,000	5.3%
Paying guest	1,000	2.5%	21,000	4.8%	0	0.0%	0	0.0%	0	0.0%
Second homes	0	0.0%	3,000	0.7%	0	0.0%	0	0.0%	1,000	2.6%
Other/mixed	3,000	7.5%	21,000	4.8%	3,000	7.5%	3,000	9.4%	2,000	5.3%
FR home	30,000	75.0%	114,000	26.1%	29,000	72.5%	25,000	78.1%	21,000	55.3%
Total 2007	40,000		437,000		40,000		32,000		38,000	
Total 2006	40,000		429,000		39,000		31,000		37,000	
% Change	0.0%		1.9%		2.6%		3.2%		2.7%	

NB: Please note that trips by accommodation type which involve fewer than 500 trips per year are not presented

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	18,000	6.0%	755,000	24.1%	20,000	7.0%	10,000	4.3%	27,000	8.4%
Self catering	21,000	7.0%	334,000	10.7%	25,000	8.8%	15,000	6.4%	82,000	25.5%
Touring/tents	5,000	1.7%	32,000	1.0%	5,000	1.8%	0	0.0%	8,000	2.5%
Static /holiday	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Group/campus	0	0.0%	623,000	19.9%	5,000	1.8%	12,000	5.1%	30,000	9.3%
Paying guest	20,000	6.7%	409,000	13.0%	0	0.0%	0	0.0%	0	0.0%
Second homes	5,000	1.7%	49,000	1.6%	7,000	2.5%	3,000	1.3%	9,000	2.8%
Other/mixed	12,000	4.0%	96,000	3.1%	13,000	4.6%	12,000	5.1%	11,000	3.4%
FR home	217,000	72.8%	836,000	26.7%	210,000	73.9%	182,000	77.8%	153,000	47.7%
Total 2007	298,000		3,135,000		284,000		234,000		321,000	
Total 2006	321,000		3,319,000		298,000		245,000		354,000	
% Change	-7.2%		-5.5%		-4.7%		-4.5%		-9.3%	

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	3.60	3.58	4.00	3.33	3.38	3.58
Self catering	21.00	37.11	25.00	0.00	41.00	36.69
Touring/tents	5.00	5.33	5.00	0.00	4.00	5.00
Static /holiday	0.00	0.00	4.92	4.25	4.92	4.70
Group/campus	0.00	11.98	0.00	12.00	15.00	12.18
Paying guest	20.00	19.48	0.00	0.00	0.00	19.50
Second homes	0.00	16.33	0.00	0.00	9.00	18.25
Other/mixed	4.00	4.57	4.33	4.00	5.50	4.50
FR home	7.23	7.33	7.24	7.28	7.29	7.30
Total 2007	7.45	7.17	7.10	7.31	8.45	7.28

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented and therefore we cannot show average duration of these trips

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	£1,501,000	12.4%	£74,029,000	40.4%	£2,209,000	19.4%	£980,000	11.1%	£2,708,000	18.4%
Self catering	£681,000	5.6%	£10,886,000	5.9%	£806,000	7.1%	£484,000	5.5%	£2,688,000	18.2%
Touring/tents	£156,000	1.3%	£1,087,000	0.6%	£177,000	1.6%	£15,000	0.2%	£260,000	1.8%
Static /holiday	£0	0.0%	£0	0.0%	£14,000	0.1%	£1,000	0.0%	£32,000	0.2%
Group/campus	£0	0.0%	£44,346,000	24.2%	£345,000	3.0%	£863,000	9.8%	£2,232,000	15.1%
Paying guest	£882,000	7.3%	£17,635,000	9.6%	£0	0.0%	£0	0.0%	£0	0.0%
Second homes	£451,000	3.7%	£2,405,000	1.3%	£589,000	5.2%	£294,000	3.3%	£781,000	5.3%
Other/mixed	£476,000	3.9%	£2,001,000	1.1%	£255,000	2.2%	£110,000	1.3%	£433,000	2.9%
FR home	£7,962,000	65.8%	£30,630,000	16.7%	£7,000,000	61.4%	£6,051,000	68.8%	£5,620,000	38.1%
Total 2007	£12,108,000		£183,018,000		£11,395,000		£8,798,000		£14,754,000	
Total 2006	£12,036,000		£179,216,000		£11,184,000		£8,751,000		£14,282,000	
% change	0.6%		2.1%		1.9%		0.5%		3.3%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£83.39	£98.05	£110.45	£98.00	£100.30	£98.10
Self catering	£32.43	£32.59	£32.24	£32.27	£32.78	£32.59
Touring/tents	£31.20	£33.97	£35.40	£0.00	£32.50	£33.90
Static /holiday	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Group/campus	£0.00	£71.18	£69.00	£71.92	£74.40	£71.32
Paying guest	£44.10	£43.12	£0.00	£0.00	£0.00	£43.16
Second homes	£90.20	£49.08	£84.14	£98.00	£86.78	£61.92
Other/mixed	£39.67	£20.84	£19.62	£9.17	£39.36	£22.74
FR home	£36.69	£36.64	£33.33	£33.25	£36.73	£35.83
Total 2007	£40.63	£58.38	£40.12	£37.60	£45.96	£53.86

NB: Please note that trips by accommodation type which involve fewer than 1,000 nights per year are not presented and therefore we cannot show average expenditure of these trips

Volume, Value and Economic Impact of Tourism on Oxfordshire

Table 20b: Overseas trip ave. spend per person per trip by accommodation stayed at						
	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£300.20	£350.85	£441.80	£326.67	£338.50	£350.98
Self catering	£681.00	£1,209.56	£806.00	£0.00	£1,344.00	£1,195.77
Touring/tents	£156.00	£181.17	£177.00	£0.00	£130.00	£169.50
Static /holiday	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Group/campus	£0.00	£852.81	£0.00	£863.00	£1,116.00	£868.84
Paying guest	£882.00	£839.76	£0.00	£0.00	£0.00	£841.68
Second homes	£0.00	£801.67	£0.00	£0.00	£781.00	£1,130.00
Other/mixed	£158.67	£95.29	£85.00	£36.67	£216.50	£102.34
FR home	£265.40	£268.68	£241.38	£242.04	£267.62	£261.47
Total 2007	£302.70	£418.81	£284.88	£274.94	£388.26	£391.95

3.2.3 Total overnight trip by accommodation

	Number of total trips		Number of total nights		Total trip expenditure	
Serviced	1,065,000	42.0%	2,365,000	25.6%	£254,822,000	49.2%
Self catering	39,000	1.5%	625,000	6.8%	£25,697,000	5.0%
Touring/tents	77,000	3.0%	333,000	3.6%	£10,581,000	2.0%
Static /holiday	13,000	0.5%	55,000	0.6%	£4,654,000	0.9%
Group/campus	149,000	5.9%	893,000	9.7%	£56,703,000	11.0%
Paying guest	22,000	0.9%	429,000	4.6%	£18,517,000	3.6%
Second homes	8,000	0.3%	84,000	0.9%	£4,958,000	1.0%
Boat moorings	28,000	1.1%	146,000	1.6%	£4,088,000	0.8%
Other/mixed	66,000	2.6%	201,000	2.2%	£7,215,000	1.4%
FR home	1,069,000	42.2%	4,121,000	44.5%	£130,188,000	25.2%
Total 2007	2,535,000		9,258,000		£517,422,000	
Total 2006	2,567,000		9,916,000		£516,995,000	
% change	-1.2%		-6.6%		0.1%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	146,000	36.2%	488,000	47.8%	118,000	31.2%	59,000	22.5%	254,000	53.9%
Self catering	4,000	1.0%	13,000	1.3%	5,000	1.3%	2,000	0.8%	15,000	3.2%
Touring/tents	17,000	4.2%	11,000	1.1%	19,000	5.0%	1,000	0.4%	29,000	6.2%
Static /holiday	2,000	0.5%	1,000	0.1%	3,000	0.8%	0	0.0%	7,000	1.5%
Group/campus	0	0.0%	134,000	13.1%	1,000	0.3%	4,000	1.5%	10,000	2.1%
Paying guest	1,000	0.2%	21,000	2.1%	0	0.0%	0	0.0%	0	0.0%
Second homes	1,000	0.2%	4,000	0.4%	1,000	0.3%	0	0.0%	2,000	0.4%
Boat moorings	0	0.0%	16,000	1.6%	12,000	3.2%	0	0.0%	0	0.0%
Other/mixed	11,000	2.7%	28,000	2.7%	10,000	2.6%	10,000	3.8%	7,000	1.5%
FR home	222,000	55.1%	305,000	29.9%	208,000	55.0%	185,000	70.6%	149,000	31.6%
Total 2007	403,000		1,021,000		378,000		262,000		471,000	
Total 2006	399,000		1,014,000		386,000		274,000		495,000	
% change	1.0%		0.7%		-2.1%		-4.4%		-4.8%	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	278,000	22.4%	1,265,000	27.8%	228,000	18.8%	114,000	13.4%	480,000	34.4%
Self catering	39,000	3.1%	359,000	7.9%	46,000	3.8%	28,000	3.3%	153,000	11.0%
Touring/tents	72,000	5.8%	54,000	1.2%	81,000	6.7%	6,000	0.7%	120,000	8.6%
Static /holiday	10,000	0.8%	4,000	0.1%	12,000	1.0%	1,000	0.1%	28,000	2.0%
Group/campus	0	0.0%	818,000	18.0%	8,000	0.7%	19,000	2.2%	48,000	3.4%
Paying guest	20,000	1.6%	409,000	9.0%	0	0.0%	0	0.0%	0	0.0%
Second homes	7,000	0.6%	51,000	1.1%	10,000	0.8%	4,000	0.5%	12,000	0.9%
Boat moorings	0	0.0%	83,000	1.8%	63,000	5.2%	0	0.0%	0	0.0%
Other/mixed	25,000	2.0%	108,000	2.4%	25,000	2.1%	23,000	2.7%	20,000	1.4%
FR home	787,000	63.5%	1,402,000	30.8%	742,000	61.1%	657,000	77.0%	533,000	38.2%
Total 2007	1,239,000		4,555,000		1,214,000		853,000		1,397,000	
Total 2006	1,292,000		4,860,000		1,297,000		926,000		1,540,000	
% change	-4.1%		-6.3%		-6.4%		-7.9%		-9.3%	

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	1.90	2.59	1.93	1.93	1.89	2.22
Self catering	9.75	27.62	9.20	14.00	10.20	16.03
Touring/tents	4.24	4.91	4.26	6.00	4.14	4.32
Static /holiday	5.00	4.00	4.00	0.00	4.00	4.23
Group/campus	0.00	6.10	8.00	4.75	4.80	5.99
Paying guest	20.00	19.48	0.00	0.00	0.00	19.50
Second home	7.00	12.75	10.00	0.00	6.00	10.50
Boat mooring	0.00	5.19	5.25	0.00	0.00	5.21
Other/mixed	2.27	3.86	2.50	2.30	2.86	3.05
FR home	3.55	4.60	3.57	3.55	3.58	3.86
Total 2007	3.07	4.46	3.21	3.26	2.97	3.65

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Serviced	£30,551,000	48.7%	£130,967,000	48.5%	£25,449,000	44.1%	£14,600,000	38.0%	£53,255,000	60.2%
Self catering	£1,917,000	3.1%	£12,578,000	4.7%	£2,270,000	3.9%	£1,363,000	3.5%	£7,569,000	8.6%
Touring/tents	£2,258,000	3.6%	£1,788,000	0.7%	£2,560,000	4.4%	£211,000	0.5%	£3,764,000	4.3%
Static /holiday	£836,000	1.3%	£350,000	0.1%	£1,013,000	1.8%	£97,000	0.3%	£2,358,000	2.7%
Group/campus	£0	0.0%	£52,135,000	19.3%	£458,000	0.8%	£1,146,000	3.0%	£2,964,000	3.4%
Paying guest	£882,000	1.4%	£17,635,000	6.5%	£0	0.0%	£0	0.0%	£0	0.0%
Second home	£527,000	0.8%	£2,485,000	0.9%	£689,000	1.2%	£344,000	0.9%	£913,000	1.0%
Boat mooring	£0	0.0%	£2,336,000	0.9%	£1,752,000	3.0%	£0	0.0%	£0	0.0%
Other/mixed	£1,386,000	2.2%	£2,815,000	1.0%	£1,105,000	1.9%	£869,000	2.3%	£1,040,000	1.2%
FR home	£24,436,000	38.9%	£46,994,000	17.4%	£22,376,000	38.8%	£19,779,000	51.5%	£16,603,000	18.8%
Total 2007	£62,793,000		£270,082,000		£57,672,000		£38,409,000		£88,466,000	
Total 2006	£62,469,000		£267,964,000		£59,854,000		£39,327,000		£87,381,000	
% change	0.5%		0.8%		-3.6%		-2.3%		1.2%	

	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£109.90	£103.53	£111.62	£128.07	£110.95	£107.75
Self catering	£49.15	£35.04	£49.35	£48.68	£49.47	£41.12
Touring/tents	£31.36	£33.11	£31.60	£35.17	£31.37	£31.77
Static /holiday	£83.60	£87.50	£84.42	£97.00	£84.21	£84.62
Group/campus	£0.00	£63.73	£57.25	£60.32	£61.75	£63.50
Paying guest	£44.10	£43.12	£0.00	£0.00	£0.00	£43.16
Second home	£75.29	£48.73	£68.90	£86.00	£76.08	£59.02
Boat mooring	£0.00	£28.14	£27.81	£0.00	£0.00	£28.00
Other/mixed	£55.44	£26.06	£44.20	£37.78	£52.00	£35.90
FR home	£31.05	£33.52	£30.16	£30.11	£31.15	£31.59
Total 2007	£50.68	£59.29	£47.51	£45.03	£63.33	£55.89

Volume, Value and Economic Impact of Tourism on Oxfordshire

Table 24b: All trips ave. spend per person per trip by accommodation						
	Cherwell	Oxford	S. Oxon	Vale	W. Oxon	Oxfordshire
Serviced	£209.25	£268.38	£215.67	£247.46	£209.67	£239.27
Self catering	£479.25	£967.54	£454.00	£681.50	£504.60	£658.90
Touring/tents	£132.82	£162.55	£134.74	£211.00	£129.79	£137.42
Static /holiday	£418.00	£350.00	£337.67	£0.00	£336.86	£358.00
Group/campus	£0.00	£389.07	£458.00	£286.50	£296.40	£380.56
Paying guest	£882.00	£839.76	£0.00	£0.00	£0.00	£841.68
Second home	£527.00	£621.25	£689.00	£0.00	£456.50	£619.75
Boat mooring	£0.00	£146.00	£146.00	£0.00	£0.00	£146.00
Other/mixed	£126.00	£100.54	£110.50	£86.90	£148.57	£109.32
FR home	£110.07	£154.08	£107.58	£106.91	£111.43	£121.78
Total 2007	£155.81	£264.53	£152.57	£146.60	£187.83	£204.11

3.3 Tourism day trips

3.3.1 Volume of tourism day trips

Table 25: Number of tourism day trips			
	2007	2006	% change
Cherwell	5,645,000	5,428,000	4.0%
Oxford	5,265,000	5,267,000	0.0%
S. Oxon	3,548,000	3,547,065	0.0%
Vale	3,250,000	3,193,271	1.8%
W. Oxon	3,209,000	3,200,988	0.3%
County	20,917,000	20,636,324	1.4%

3.3.2 Value of tourism day trips

Table 26 Tourism day trip expenditure			
	2007	2006	% change
Cherwell	£192,904,000	£185,490,000	4.0%
Oxford	£189,540,000	£189,623,000	0.0%
S. Oxon	£123,623,000	£123,590,000	0.0%
Vale	£113,522,000	£111,531,000	1.8%
W. Oxon	£111,134,000	£110,848,000	0.3%
County	£730,723,000	£721,082,000	1.3%

Table 26a: Tourism day trip ave. spend per person	
	2007
Cherwell	£34.17
Oxford	£36.00
S. Oxon	£34.84
Vale	£34.93
W. Oxon	£34.63
County	£34.93

Breakdown of expenditure associated with trips

3.4.1 Breakdown of total trip expenditure by sector

	Domestic		Overseas		Day		Total	
Accom.	£92,487,000	33%	£74,180,000	31%			£166,667,000	13%
Retail	£49,717,000	17%	£61,543,000	27%	£232,735,000	32%	£343,995,000	28%
Catering	£58,160,000	20%	£45,230,000	20%	£280,549,000	38%	£383,939,000	31%
Attr/ent.	£24,132,000	8%	£28,862,000	13%	£70,880,000	10%	£123,874,000	10%
Transport	£62,854,000	22%	£20,259,000	9%	£146,559,000	20%	£229,672,000	18%
Total 2007	£287,350,000	100%	£230,074,000	100%	£730,723,004	100%	£1,248,147,000	100%

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Accom.	£22,402,000	9%	£89,078,000	19%	£18,723,000	10%	£10,341,000	7%	£26,123,000	13%
Retail	£97,057,000	38%	£149,625,000	33%	£31,870,000	18%	£28,144,000	19%	£37,299,000	19%
Catering	£79,490,000	31%	£119,956,000	26%	£63,261,000	35%	£55,651,000	37%	£65,581,000	33%
Attrac/ent.	£24,105,000	9%	£47,370,000	10%	£17,408,000	10%	£15,115,000	10%	£19,876,000	10%
Transport	£32,642,000	13%	£53,594,000	12%	£50,033,000	28%	£42,681,000	28%	£50,722,000	25%
Total 2007	£255,696,000		£459,623,000		£181,295,000		£151,932,000		£199,601,000	

3.4.2 Breakdown of overnight domestic trip expenditure

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Accom.	£18,097,000	36%	£29,123,000	33%	£14,830,000	32%	£8,179,000	28%	£22,258,000	30%
Retail	£7,538,000	15%	£14,371,000	17%	£8,021,000	17%	£5,986,000	20%	£13,801,000	19%
Catering	£9,332,000	18%	£17,448,000	20%	£9,218,000	20%	£6,272,000	21%	£15,890,000	22%
Attrac/ent.	£3,499,000	7%	£7,236,000	8%	£3,735,000	8%	£2,644,000	9%	£7,018,000	10%
Transport	£12,219,000	24%	£18,886,000	22%	£10,473,000	23%	£6,531,000	22%	£14,745,000	20%
Total 2007	£50,685,000		£87,064,000		£46,277,000		£29,612,000		£73,712,000	

3.4.3 Breakdown of overnight overseas trip expenditure

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Accom.	£4,305,000	36%	£59,955,000	33%	£3,893,000	34%	£2,162,000	25%	£3,865,000	26%
Retail	£2,519,000	21%	£49,771,000	27%	£2,462,000	22%	£2,519,000	29%	£4,272,000	29%
Catering	£2,256,000	19%	£35,790,000	20%	£2,245,000	20%	£1,813,000	21%	£3,126,000	21%
Attrac/ent.	£1,894,000	16%	£21,749,000	12%	£1,682,000	15%	£1,459,000	17%	£2,078,000	14%
Transport	£1,133,000	9%	£15,754,000	9%	£1,113,000	10%	£845,000	10%	£1,414,000	10%
Total 2007	£12,107,000		£183,019,000		£11,395,000		£8,798,000		£14,755,000	

3.4.4 Breakdown of tourism day trip expenditure

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Retail	£87,000,000	45%	£85,483,000	45%	£21,387,000	17%	£19,639,000	17%	£19,226,000	17%
Catering	£67,902,000	35%	£66,718,000	35%	£51,798,000	42%	£47,566,000	42%	£46,565,000	42%
Attrac/ent.	£18,712,000	10%	£18,385,000	10%	£11,991,000	10%	£11,012,000	10%	£10,780,000	10%
Transport	£19,290,000	10%	£18,954,000	10%	£38,447,000	31%	£35,305,000	31%	£34,563,000	31%
Total 2007	£192,904,000		£189,540,000		£123,623,000		£113,522,000		£111,134,000	

3.5 Additional expenditure associated with tourism activity

Table 32: Other expenditure associated with tourism activity						
	Second homes	Boats	Friends and relatives	Total 2007	Total 2006	% change
Cherwell	£203,000	£0	£10,604,000	£10,807,000	£10,457,000	3.3%
Oxford	£212,000	£1,600,000	£15,001,000	£18,260,000	£18,922,000	-3.5%
S. Oxon	£265,000	£1,200,000	£9,697,000	£11,162,000	£10,472,000	6.6%
Vale	£132,000	£0	£9,337,000	£9,469,000	£9,126,000	3.8%
W. Oxon	£351,000	£0	£9,070,000	£9,921,000	£10,786,000	-8.0%
County	£1,163,000	£2,800,000	£61,709,000	£59,619,000	£59,763,000	-0.2%

3.6 Economic impact

3.6.1 Direct turnover derived from total trip expenditure

Accommodation	£174,345,000	15%
Retail	£340,555,000	29%
Catering	£372,420,000	32%
Attraction/entertainment	£131,152,000	11%
Transport	£137,803,000	12%
Total	£1,156,275,000	100%
Additional trip related expenditure	£59,619,000	
Total direct	£1,215,894,000	

	Cherwell		Oxford		S. Oxon		Vale		W. Oxon	
Accommodation	£23,993,000	10%	£91,477,000	21%	£19,988,000	12%	£11,453,000	8%	£27,434,000	15%
Retail	£96,087,000	40%	£148,128,000	34%	£31,551,000	20%	£27,863,000	21%	£36,926,000	21%
Catering	£77,105,000	32%	£116,358,000	27%	£61,363,000	38%	£53,981,000	40%	£63,613,000	35%
Attractions	£25,870,000	11%	£50,066,000	11%	£18,359,000	11%	£15,953,000	12%	£20,904,000	12%
Transport	£19,585,000	8%	£32,156,000	7%	£30,020,000	19%	£25,608,000	19%	£30,434,000	17%
Total	£242,640,000	100%	£438,185,000	100%	£161,281,000	100%	£134,858,000	100%	£179,311,000	100%
Additional trip related expenditure	£10,807,000		£18,260,000		£11,162,000		£9,469,000		£9,921,000	
Total direct	£253,447,000		£456,445,000		£172,443,000		£144,327,000		£189,232,000	

NB: Adjustment to travel following 40% deduction in income to account for fact that proportion of spend takes place outside destination

3.6.1 Total turnover derived from total trip expenditure

	Total
Direct	£1,215,894,000
Multiplier effect	£281,315,000
2007	£1,497,209,000
2006	£1,487,624,005
% change	0.6%

Volume, Value and Economic Impact of Tourism on Oxfordshire

	Direct	Multiplier	Total 2007	Total 2006	% change
Cherwell	£253,447,000	£40,969,000	£294,416,000	£271,833,000	8%
Oxford	£456,445,000	£147,876,000	£604,321,000	£616,768,000	-2%
S. Oxon	£172,443,000	£31,749,000	£204,192,000	£205,749,000	-1%
Vale	£144,327,000	£25,309,000	£169,636,000	£171,907,005	-1%
W. Oxon	£189,232,000	£35,412,000	£224,644,000	£221,367,000	1%

3.6.1 FTE employment supported by tourism spending

	Direct	Indirect	Induced	2007	2006	% change
Cherwell	3,505	566	95	4,166	3,879	7%
Oxford	6,022	1,746	722	8,319	8,490	-2%
S. Oxon	2,181	442	74	2,677	2,697	-1%
Vale	1,929	295	32	2,226	2,256	-1%
W. Oxon	2,038	700	131	2,911	2,869	1%
County	15,675	3749	1054	20,299	20,191	0.5%

3.6.2 Actual employment supported by tourism spending

	Direct	Indirect	Induced	2007	2006	% change
Cherwell	4,832	766	130	5,728	5,382	5%
Oxford	8,130	2,357	975	11,462	11,401	1%
S. Oxon	2,944	597	100	3,641	3,799	-4%
Vale	2,604	398	43	3,045	3,089	-1%
W. Oxon	2,751	945	177	3,873	4,038	-4%
County	21,261	5063	1425	27,749	27,709 ? 27,752?	0.1%

GLOSSARY OF TERMS

Staying trips

Staying trips comprise a visit which involves a stay away from home of at least one night. The study measures trips, rather than visitors as one visitor may make multiple trips to an area in a given period.

Tourism day trips

Day trips are defined as a visit to and from home for leisure purposes, undertaken on an irregular basis and lasting a minimum of three hours. The report excludes trips undertaken for business or study purposes, as these are not covered by the Leisure Day Visits Survey methodology. The definition of day trips adopted by this study is that used by the Department of Culture, Media and Sport.

VFR Trips

VFR trips are defined as a visit where the main purpose is visiting friends and relatives. Whilst many trips to visit friends and relatives will be accommodated in the homes of these friends/ relatives, some will make use of other forms of accommodation. It should be also noted that other forms of trip, for instance for holiday or business purposes may stay with friends and relatives rather than in commercial accommodation.

'Other-trip' Expenditure

Apart from the spending associated with the individual trips, additional spending by non-visitors, e.g. friends and relatives with whom the visitor is visiting and/or staying with will also take place. Moreover, owners of second homes/boats will spend some money on maintenance, repair.

Economic multiplier

Multipliers are used to estimate the economic impact of visitor expenditure. Visitor expenditure produces three effects. Direct effects are changes in the business sector directly receiving visitor expenditure. For instance, visitors staying in a hotel will directly increase revenue and the number of jobs in the hotel sector. Indirect effects are the changes in supplier businesses. For example, these indirect effects would be hotels purchasing more linen from local suppliers as a result of increased business. Induced effects are changes in local economic activity resulting from household spending. For instance, employees of the hotel and linen supplier spend their wages in the local area, resulting in more sales, income and jobs in the area.

Full Time Equivalent Jobs (FTE)

For the purposes of the Model, a FTE is defined by the average annual salary plus employment costs in the sector concerned.

Direct jobs

Jobs directly generated in those local businesses in which visitors spend money, i.e. hotels, catering establishments.

Indirect jobs

Jobs created locally due to the purchases of goods and services by businesses benefiting from visitor expenditure, i.e. jobs with local suppliers.

Induced jobs

Jobs created throughout the local economy because employees employed due to visitor expenditure spend their wages locally on goods and services such as food, clothing and housing.

Actual Jobs

Many jobs are seasonal or part-time in their nature in the tourism sector, so an adjustment is made to calculate the actual number of jobs from the number of FTEs. The adjustment made is based on the findings of surveys of tourism related businesses, and national employment surveys.

Annual Business Inquiry (ABI)

This is the main government survey of companies in the UK. It is conducted in two parts: one dealing with employment, the other with financial information.

Volume, Value and Economic Impact of Tourism on Oxfordshire

United Kingdom Tourism Survey (UKTS)

The United Kingdom Tourism Survey is undertaken by BRMB for VisitBritain and is based on 1,000 telephone interviews per week (50,000 annually). It provides basic headline data on the volume and value of domestic tourism at a national, regional and county level.

International Passenger Survey (IPS)

The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 210,000 interviews are undertaken each year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK.

England Leisure Visit Survey (ELVS)

The leisure day visits survey was last conducted in 2005 and covered approximately 5,000 respondent interviews. Unlike the IPS and UKTS, this survey is not undertaken on an ongoing basis and thus adjustments are made in the model to account for annual increments in the value and volume based on trends observed in 2005.

United Kingdom Occupancy Survey (UKOS)

As part of the EU Directive on Tourism Statistics adopted in 1995, the UK must report regularly on a specified range of statistics to Eurostat, the official statistical office of the European Union. Included in these statistics are monthly occupancy rates for UK serviced accommodation. The responsibility for providing this data lies with the four National Tourist Boards, and across England the survey is undertaken by the Regional Tourist Boards. A sample of establishments is recruited to the survey and asked to complete a data form each month, giving details of their nightly occupancy. The data form is processed and analysed to produce monthly occupancy rates for the whole of the area and for specific categories of type, size, location etc.

Annual Survey of Hours and Earnings

The AHSE Survey provides information on wage levels by industry sector and occupation. The main strength of the AHSE is its large sample size. It is based on a 1% sample of employees who are members of PAYE. The coverage of full-time adult employees is virtually complete, and consequently the survey is representative of hours worked for full-time employees on adult rates of pay (although the survey is currently not weighted). The coverage of part-time employees is not comprehensive, as some part-time workers will have earnings below the income tax threshold. The AHSE is the best source for estimating full time earnings.

Labour Force Survey (LFS)

The LFS is a household panel survey, continuous since 1992, with results produced each quarter. It has a sample of approximately 60,000 households. The LFS is the government's largest continuous household survey and participation in the survey is voluntary. LFS data is weighted to enable the population estimates to be produced. The weighting also attempts to compensate for differential non-response among different subgroups in the population. LFS is designed to provide information on the UK labour market that can be used to develop, manage and evaluate labour market.